CREATIVE COLUMBUS

a picture of the

creative economy of

Central Ohio

June 2009

CREATIVE COLUMBUS IS

FUNDED BY

Columbus College of Art & Design

The Columbus Foundation

competecolumbus

Franklin County
Where Government Works

gcac
Greater Columbus Arts Council

The Ohio State University

RESEARCHED BY

Community Research Partners

WITH ASSISTANCE FROM

Columbus Chamber

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Columbus College of Art &Design
The Columbus Foundation
Compete Columbus
Franklin County Commissioners
Greater Columbus Arts Council
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Message from CCAD

This report is the sum of a lot of work by a lot of people to try and measure the size, reach, and impact of central Ohio's creative economy.

From the get-go, this project sought to develop an inventory of creative economy workers here, and to develop a reasonable, measured working definition of who those people are. A special salute goes to the April 9, 2007 publication by the Creative Columbus Policy Steering Committee entitled *The Creative Economy: Leveraging the Arts, Culture, and Creative Community for a Stronger Columbus.* Their work informed ours and without it we would've been enfeebled.

Importantly, this study calls out the role of design in some detail, and it is an appreciation of the design arts as manifest in both commerce and culture that give us a central way to grasp the breadth and depth of the creative economy in central Ohio.

Currently there are some 40 organizations in the region dedicated to economic development. As enterprises ranging from the Columbus Partnership and Compete Columbus to the many chambers of commerce seek to amplify our competitive edge and refine our civic and economic identity, we believe this report provides some revealing and useful grist for the mill.

Ironically, what's left unsaid is what to do with the findings. What we learned is that the creative economy here is larger than one might realize and robust in ways that have heretofore gone unmeasured. It seems incumbent on all of us to leverage these assets.

—Denny Griffith, President, Columbus College of Art & Design

Message from CRP

Creative Columbus is a unique project in terms of its breadth, depth, and—for the lack of a better word—creativity. Other regions have conducted studies of their creative economy, from New York to Los Angeles, from Portland, Oregon, to New England. However, these studies typically examined creative industries, using secondary data at the regional level. The design of their reports tends to be "plain vanilla".

Creative Columbus, on the other hand, looks at both industries and occupations. In addition to regional data, it drills down to neighborhoods. To augment secondary data, we conducted a survey. Besides creative economy employers, we sought the perspectives of sole proprietors, employees, and students. We used online networking sites and local blogs to generate awareness about the project. Offline, we had conversations with the creative community. In the end, we created a visual report that balances aesthetics with the presentation of a great deal of data for a wide range of audiences. The inspiration for the report design, which contains images from local photographers, came not just from similar studies, but also from magazines, websites, TV, film, and art.

The expectations for this project were high. Key stakeholders had differing opinions about the research purpose and product, and meeting these expectations stretched *our* creativity. Now that the work is done, a question remains: *How can Creative Columbus support the community's other cultural and civic initiatives?* We believe it provides valuable new insights for civic leaders, funders, businesses, arts organizations, educational institutions, and, of course, those who work in the creative economy—all of whom helped to make Creative Columbus a reality.

—The staff of Community Research Partners

FACTS AND FIGURES

Over **18,000** people are employed in Central Ohio's **creative industries**. Nearly **12,000** are in **creative occupations**. Why are these numbers different? |2-5

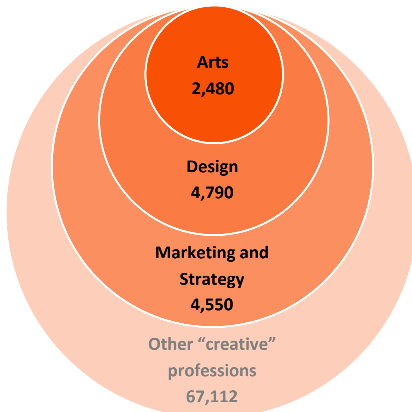
Hint: 87% of designers work in non-design firms and the majority of jobs at design firms are not designers. |3-23

1. Background and Methods

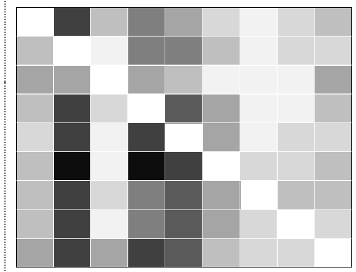
Outreach wasn't just an excuse to use Facebook at work. How we used social media to engage the community on an economic study and survey. |1-8

2. Defining the Creative Economy

Depending on one's definition, the size of the **creative workforce** can range from 2,480 to nearly 80,000. We drew the line at **11,820**. Find out why. |2-8



Is this a Rorschach test?



No. Government data puts creative industries into silos. Our survey data shows how industries overlap. Visual arts, media, marketing, and digital design form a heavily interconnected cluster. |3-17

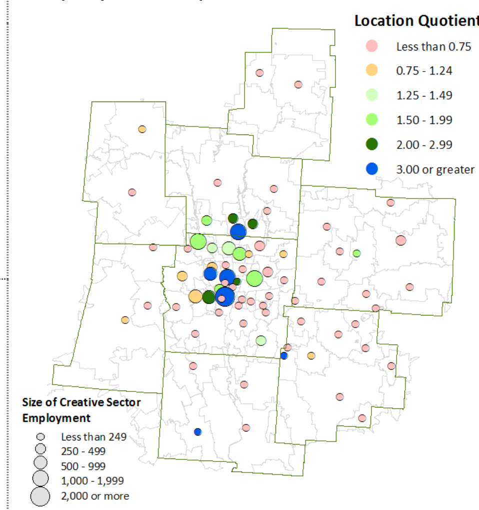
In 2006, creative industries generated over **$3 billion** in **business receipts**, **$932 million** in **employee income**, and **$67 million** in state and local **tax revenues**. |3-6

The **media** industry represents over half of Central Ohio's creative sector. But **built environment** (e.g. architecture) and **product design** have greater shares of the region's employment compared to national averages. |3-4

5.7% of sole proprietors in Central Ohio are in creative fields, compared to only **3.4% of employers**. |3-8

3. Central Ohio Creative Industries

You always suspected Central Ohio's creative economy was centered on downtown Columbus, right? But at a concentration **triple** that of overall employment? |3-13



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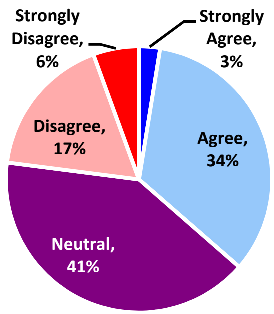
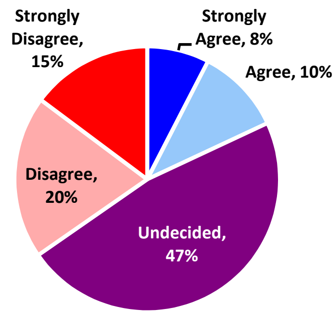


The student perspective: "I intend to stay in Central Ohio after I graduate." Agree or disagree? |5-4



Areas where higher education curriculum can be improved. |4-11

Top 3 chosen by students:

1. Make education and training more affordable
2. Offer more student employment opportunities
3. Offer greater guidance with choosing careers

Top 3 chosen by businesses and organizations:

1. Offer curriculum that simulates work environment
2. Offer more student employment opportunities
3. Have greater employer presence at school

The top area where surveyed… |3-15

- Businesses and organizations are located: Downtown (39%)
- Self-employed individuals conduct their work: Clintonville (17%)
- Employees work: Downtown (41%) - though only 3% live downtown
- Employees live: Clintonville (16%)
- Students live: OSU area (27%)

Central Ohio has an occupational cluster in **design**. Fashion designers' share of the region's jobs is 3.62 times their national share. |4-6

Other design concentrations in the region:

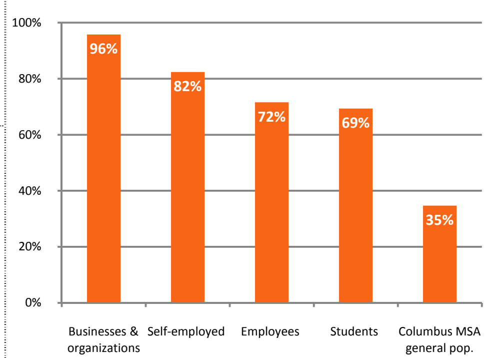
- Commercial/industrial designers (2.30)
- Interior designers (1.72)
- Graphic designers (1.20)

What's this guy doing in the report? |2-6

#1 skill gap in labor pool selected by survey takers: **project management**. |4-10

5. Strengths and Weaknesses

Our creative economy has a strong civic element. The share of survey respondents who volunteer their time and skills (69% to 96%) is higher than the overall regional figure (35%). |5-9



When asked to make up and answer their own question, the most common theme (besides students' ponderings on food) was an **online resource** for the creative community to **network** and **promote** and **find services**. |6-5

6. Advancing Our Creative Economy

Top ways to improve Central Ohio's creative economy…
Attract and retain talent, check.
Improve Central Ohio's image, check.
Pool health care costs?
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1. Background and Methods

Photo courtesy of GCAC

1. Background and Methods

Preview

Project purpose | 1-3

- The purpose of the Creative Columbus research project, spearheaded by Columbus College of Art & Design and an advisory committee of funders and community leaders, was to gain a better understanding of the magnitude and characteristics of Central Ohio's creative services economy.

Research design and methods | 1-4

- The project included three phases: 1) literature review, focus groups, and interviews to finalize the survey design and the definition of "creative economy"; 2) collection and analysis of government data on creative industries and occupations; and 3) an online survey.
- The primary government data sets used were 2006 data on industries and occupations (the most recent available) from the U.S. Census and the Bureau of Labor Statistics; however, there are limitations to these sources, which are noted in this section.
- Four versions of the on-line survey were created to reach out to different groups: businesses and organizations with employees; self-employed individuals; employees in creative industries and occupations; and students.
- A total of 885 people responded to all or part of the survey. This total included 66 businesses or organizations, 190 self-employed persons, 325 employees, and 304 students.

Creative outreach and marketing | 1-8

- Creative marketing—from traditional media to social media to networking—was key to engaging the creative community in this research project.

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Project purpose

Toward a better understanding of our creative economy

Discussion of a Creative Columbus research project began in April 2007, when Denny Griffith, President of the Columbus College of Art & Design (CCAD), first approached Community Research Partners (CRP) about undertaking a study of the "creative services sector" in Central Ohio, modeled after a similar study in Los Angeles. The objective was to learn more about the magnitude and characteristics of central Ohio's creative services industries and occupations, which were identified in a study conducted for Compete Columbus as part of the "entertainment, arts, and tourism" priority industry cluster.

Over the next year, funding partners were identified, and a project advisory committee of funders and creative-sector and civic leaders was selected. The project design was refined to include not only analysis of economic data, as was done for the Los Angeles study, but also to collect firsthand information from those working, studying, and operating businesses and organizations in the creative economy. In addition, the Columbus Chamber agreed to partner with CRP on the project by contributing the services of its staff economist.

Work on the project began in April 2008 and evolved into a project that blended traditional research methods with creative approaches to collect and present data and tap into the knowledge of those involved in the creative services economy. While there is always more to learn, the research presented in this report provides a unique picture of this key component of the central Ohio economy

About the project partners

The Columbus College of Art & Design is one of the largest and oldest private art colleges in the United States. Recognized as a leader in visual arts education and as a resource for artists and the community, CCAD advances a distinct learning culture by blending a tradition of professionalism and a commitment to quality with a solid education in the fundamentals of art and the humanities. CCAD has more than 1,300 students from 40 states and 35 foreign countries.

Community Research Partners is a unique research and evaluation center based in Columbus that strengthens Ohio communities through data, information, and knowledge. Since 2001, CRP has undertaken over 150 projects within and outside of Central Ohio across a wide range of program and policy areas. CRP is a partnership of the City of Columbus, United Way of Central Ohio, the Franklin County Commissioners, and the John Glenn School at The Ohio State University.

The Columbus Chamber leads and supports economic growth and development for the Greater Columbus community. The Chamber achieves that mission through activities that benefit its members and attract new investment to Columbus.

The project funders are: CCAD, The Columbus Foundation, the Greater Columbus Arts Council, The Ohio State University, the Franklin County Commissioners, and Compete Columbus.

Research design and methods

The Creative Columbus project consisted of three phases:

- **Phase 1: Project design**—Literature review, interviews and focus groups to finalize the research design, including the definition of "creative economy" for the research study
- **Phase 2: Data collection and analysis**—Collection and analysis of economic data to describe the size, characteristics, magnitude, and direct economic value of the creative economy
- **Phase 3: Survey**—A survey of creative economy employers, sole proprietors, employees, and students to learn more about them and their impact on the economy

Interviews and focus groups

CRP conducted 13 telephone interviews and 2 focus groups attended by 11 people (see Appendix A). The participants, who included a range of people from the creative community, were drawn from a list suggested by the project advisory committee. The interviewees and focus group participants were asked to discuss:

- *What is the definition of "creative economy"?*
- *What are the strengths and weaknesses of the Central Ohio creative economy?*
- *How does the creative economy impact the regional economy?*
- *What questions should be asked in the survey?*
- *How should survey marketing and outreach be conducted?*

Figure 1-1. Central Ohio counties

For this project, Central Ohio is defined as the Census Bureau's Columbus Metropolitan Statistical Area (MSA). Below are basic statistics for the MSA.

- *Population: 1,754,337*
  U.S. Census Bureau, Population Estimates 2007
- *Employers: 42,362*
  Employment: 901,324
  Quarterly Census of Employment and Wages, 2006

Economic data

This research uses publicly available data from the U.S. Department of Labor's Bureau of Labor Statistics (BLS) and the U.S. Census Bureau to help define and measure the creative economy. Most data are for 2006, the most recent year available across all datasets. For Occupational Employment Statistics, where 2006 estimates were unavailable at the metropolitan area level, 2007 estimates were used for some industries.

Data on industries

- **BLS, Quarterly Census of Employment and Wages (QCEW)**—The most complete sampling of businesses, covering 98% of wage and salary civilian employment, including the public sector. QCEW data was used where possible for counts of employers and employment.
- **Census Bureau, County Business Patterns**—County level data on private employers by size; provides a means of estimating employment for industries where data are suppressed by QCEW.
- **Census Bureau, Zip Code Business Patterns**—Zip Code level data on private employers by size and industry; provides basis for jurisdictional estimates.
- **Census Bureau, Nonemployer Statistics**—County estimates of businesses with no paid employees.
- **Census Bureau, Economic Census** – Provides 2002 ratio of total wages to total receipts for use in 2006 estimates of industry receipts.

Data on occupations

- **BLS, Occupational Employment Statistics (OES)**—Employment and wage estimates for over 820 types of nonfarm occupations
- **BLS, Employment Projections, National Employment Matrix**—Data on occupations by industry at the national level

Limitations of public data sets

- **Limitations of sample surveys:** The BLS and Census Bureau collect economic data through surveys of businesses. Survey participation is voluntary, and data for some industries was not available due to insufficient sample size.
- **Inconsistent availability of data on public sector employers:** Data on public sector employers is not available across all datasets, including the Census Bureau's County and Zip Code Business Patterns. The QCEW excludes jobs that are exempt or otherwise not covered by unemployment insurance, which includes some state and local government workers, self-employed individuals, and some religious organizations.

How data limitations are addressed in this report

In this report, data on employer establishments and their employees include only private sector employers; excluded are local, state, and federal government, as well as public colleges and universities.

Data on occupations, however, include all non-farm employment, both public and private sector. This is noted throughout the report, where applicable.

Key economic terms used in the report

Employer business: A business organization, under common ownership or control and with one or more establishments, that has some annual payroll.

Employment: All full and part-time employees on an employer's payroll during the survey period.

Industry: Classification of employer establishments based on their principal product or service, using the six-digit North American Industry Classification System (NAICS) hierarchical coding system.

Location quotient (LQ): The relationship between a geographic area's (city, county, state) share or concentration of a particular industry and the share of a larger geographic area, typically the nation. For example, a LQ of 2.0 indicates that the percent of local employment in an industry is twice that of the nation, while a LQ of 0.5 indicates that it is half the national figure.

MSA or "metro area": U.S. Census Bureau Metropolitan Statistical Area

Net new employees: The number of employees on the last day of a reporting period minus the number of employees at the beginning of the reporting period.

Non-employer business: A business that has no paid employees and has annual business receipts of $1,000 or more. Most are sole proprietors, but some are partnerships or small corporations. (*Note: Non-employer businesses are also referred to in the report as "sole proprietor," "self-employed," and "freelancer."*)

Occupation: Classification of workers into over 820 occupations, based on job duties, skills, education, or experience, using the 2000 Standard Occupational Classification (SOC).

Private sector: All industries ***excluding*** local, state, and federal government; public colleges and universities are included in the public sector.

Sources: Ohio Labor Market Information, U.S. Census, Bureau of Labor Statistics

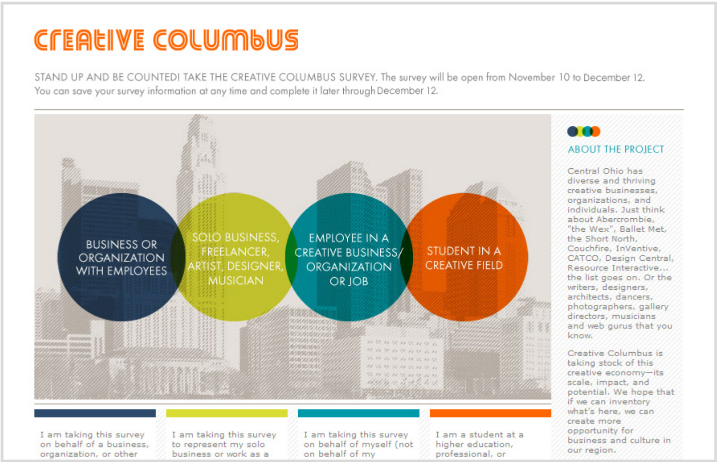
Creative Columbus survey

Four versions of an online survey were created to target different categories of organizations and people in the creative economy:

1. Businesses and organizations with employees
2. Self-employed individuals/sole proprietors
3. Employees in the creative economy
4. Students

CRP worked with a graphic designer to create a survey landing page (Figure 1-2) that unified the four surveys, directed respondents to the appropriate survey tool, and provided background information about Creative Columbus.

Figure 1-2. Creative Columbus survey landing page



Survey questions

The survey versions for businesses and organizations and for self-employed individuals included questions on the following topics:

- Business/organization characteristics
- Industry and function descriptions
- Revenue from, or time spent on, creative activities
- Contribution to the local economy, both in dollars and unpaid time
- Clients, customers, supporters
- Suppliers, contractors
- Number of employees and hiring trends
- Attracting and retaining talent
- Skills gaps and education

The surveys for employees and students focused on their field of work or study and their perspectives on the issue of attraction and retention of creative sector talent.

Survey responses

The Creative Columbus survey was conducted from November 10 to December 12 in 2008. Over 1,200 people initiated the survey, and 716 completed the survey. However, as with many surveys, attrition was evident in the pattern of responses (Table 1-1).

All partial and completed survey responses were tabulated; however, the number of respondents varies from question to question. Even within the completed survey category, there may be skipped questions. As a result, all survey response percentages calculated in this report are based on the number of valid responses for the particular question, and this number is identified throughout the report. Where results from multiple questions are cross-tabulated, the number of valid responses is limited to respondents who provided valid responses for all questions concerned. Although each of the four target groups had different surveys, many questions were the same or similar, allowing for comparison or aggregation across groups.

The survey respondents do not comprise a statistically significant sample, and therefore are not representative of their respective populations as a whole.

Table 1-1. Creative Columbus online survey responses

Respondent Type	**Started** (1)	**Partial** (2)	**Completed** (3)
Businesses and organizations	122	66	38
Self-employed individuals	300	190	132
Employees	451	325	269
Students	371	304	277
TOTAL	1,244	885	716

Source: Community Research Partners, Creative Columbus online survey

1. Started: respondent answered at least the first page of questions

2. Partial: respondent answered any question beyond the first page; a subset of "started"

3. Completed: respondent answered any of the last three questions; a subset of "partial"

Creative outreach and marketing

Interviewees, focus group participants, and advisory committee members called for innovative approaches to marketing the project and survey. Some suggestions were simply beyond the project's time and resource constraints. An even greater challenge was finding precedents for such marketing and outreach efforts in the context of a research project. While there were examples for companies, organizations, products, and charitable causes, any best practices among them had to be considered from a different angle for this study.

The result was a combination of traditional and "guerilla" marketing. This included print media, alumni contact databases, outreach through professional organizations (e.g. AIA, AdFed), posts on local blogs such as Columbus Underground, and the creation of project pages on the Facebook and MySpace social networking sites (Figure 1-3). Over time, publicity snowballed. For example, the Columbus Metropolitan Library, without solicitation, posted information about the Creative Columbus survey on its homepage.

Beyond the various outreach tools, the most important factors may have been responsiveness and persistence. After the interviews and focus groups were completed, CRP staff continued to communicate with members of the creative community, including a presentation on the project at the September 20, 2008 Independents' Day event, a celebration of the spirit of creativity in urban Columbus.

Although outreach efforts peaked around the survey period, Creative Columbus has had a public presence before and after the survey. The Facebook page, for instance, has provided a venue for submission of images from the public, some of which are used in this report.

Figure 1-3. Creative Columbus pages on Facebook and MySpace

Format of the report

The Creative Columbus report includes the following sections. Each section begins with a “preview” that highlights key points.

Contents

Highlights

Caveats about accuracy

CRP has exercised great care in collecting, analyzing, and presenting data from a variety of sources to prepare this report. Although CRP has judged its data sources to be reliable, it was not possible to authenticate all data. If careful readers of the report discover data errors or typographical errors, CRP welcomes this feedback and will publish corrections on its website.

2. Defining the Creative Economy

Ohio Theatre, photo by Bryan Fenstermacher

2. Defining the Creative Economy

Preview

Investigating the Central Ohio creative cluster | 2-3

- A goal of Creative Columbus was to describe the assets in the region's "creative cluster" of industries, organizations, and artistic workforce.

How others define the creative economy | 2-4

- "Creative economy" has been defined in various ways, ranging from a strict arts focus to a broad group of knowledge-based industries that include engineering, law, accounting, science, and IT.

Considerations in the Central Ohio definition | 2-5

- Creative Columbus uses a framework that comprises both creative industries and creative occupations, including creative jobs in non-creative industries (i.e. a graphic designer in an accounting firm).
- A supply chain analysis was used to make decisions about which sub-categories of industries to include. Testing definitions in different industries (i.e. sculpture and toys) revealed the challenges of establishing a uniform selection standard.
- Limitations of available government economic data prevent fine-grained distinctions between similar businesses and organizations—for example, local creative scene restaurants vs. chain restaurants.

The Creative Columbus definition | 2-7

- The Creative Columbus definition of "creative economy" includes arts, design, marketing, and strategy industries and occupations. This definition yields a figure of over 11,800 persons working in creative *occupations* and about 18,300 working in creative *industries* within Central Ohio.
- Creative Columbus includes economic data on 46 industries organized into 7 industry groups and 37 occupations in 15 major categories, augmented with local information and perceptions from interviews, focus groups, and a survey of the creative community.

Investigating the Central Ohio creative cluster

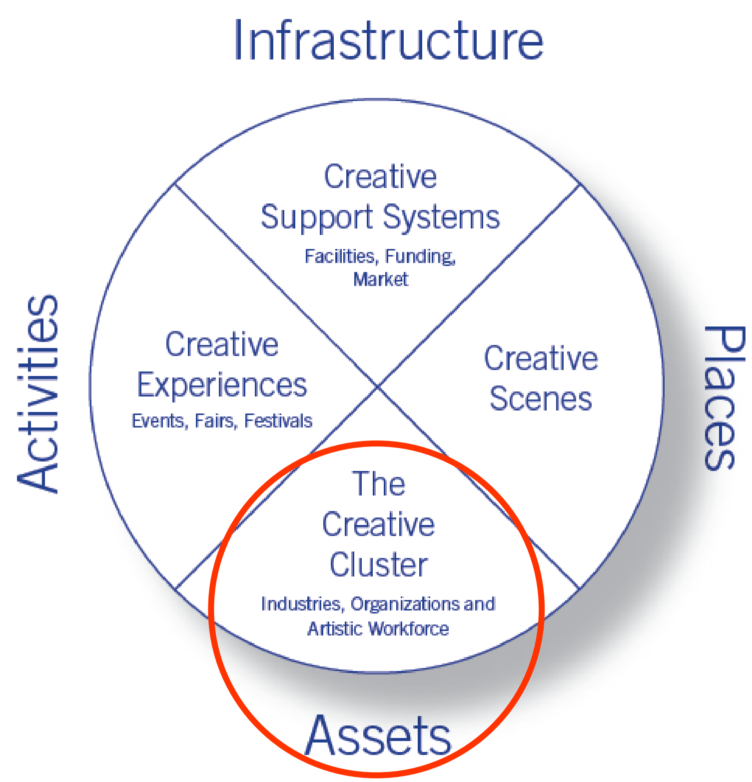
In April 2007, the Creative Columbus Policy Steering Committee (no direct connection to this project) presented to Columbus City Council their report, *The Creative Economy: Leveraging the Arts, Culture and Creative Community for a Stronger Columbus.* The report included an extensive theoretical framework and policy agenda, and provided a context and starting point for this research.

Using the "ecology" framework from *The Creative Economy* report (Figure 2-1), it was determined that the Creative Columbus project focus would be to further investigate and define the "assets" represented by the creative cluster of industries, organizations, and workforce.

The goal of Creative Columbus was not just to measure the whole of Central Ohio's creative economy, but also to understand its parts. For example: *What is the size of the media industry compared to that of architecture? Where in the region are creative industries concentrated? How are different parts of the creative economy connected with one another and with the broader economy?*

These were some of the questions this project sought to answer by analyzing data from government sources and an online survey of the creative community. However, before the research could get underway, a number of decisions had to be made about which industries and occupations would be included in the Central Ohio definition of "creative economy." The remainder of this section describes the thought process and analysis that went into finalizing this definition.

Figure 2-1. Ecology framework of the creative economy



Source: The Creative Economy: Leveraging the Arts, Culture and Creative Community for a Stronger Columbus (Creative Columbus Policy Steering Committee, April 2007)

How others define the creative economy

Many people are familiar with the work of Richard Florida. His 2002 book, *The Rise of the Creative Class*, set off a wave of interest among municipalities and regions looking for an economic development edge. Florida's definition is broad, including most sectors that require creative thinking—not just arts and design fields, but also sectors such as science and finance.

Americans for the Arts has produced research with varying definitions of the arts. *Arts & Economic Prosperity III* focused on non-profit arts and culture organizations. However, Americans for the Arts also provides standardized economic impact reports that cover a wider range of sectors, including design and marketing fields.

Many studies define the creative economy based on their local interests and strengths. Otis College of Art & Design, in its *Report on the Creative Economy of the Los Angeles Region*, calculated that the creative industries represented 346,003 jobs in Los Angeles County. This figure included 105,814 jobs in fashion and 41,642 jobs in furniture and home furnishings, for a combined 43% of the L.A. creative economy. In part, the size of these two sectors is due to the inclusion of manufacturing and warehousing employment, in addition to design.

Figure 2-2. A tiered view of creative economy definitions

Arts often form the core of the discussion. Richard Florida's definition would include all four tiers, but other studies vary.

Considerations in the Central Ohio definition

Industries vs. occupations

The majority of creative economy studies around the country use data based on the North American Industry Classification System (NAICS). NAICS data can capture businesses in creative industries and employment in those businesses. The data do not differentiate among types of employment, so both the museum curator and the museum's cleaning staff would be in the employment count. While this may be a concern for some people, others may argue that the janitorial job is generated by the museum and should therefore be counted.

Figure 2-3. Intersection of creative and non-creative industries and occupations

	Creative Occupation	Non-Creative Occupation
Creative Industry	Graphic designer at graphic design firm	Accountant at graphic design firm
Non-Creative Industry	Graphic designer at accounting firm	Accountant at accounting firm

This matrix provides an example of how creative and non-creative industries and occupations intersect

Other studies use Standard Occupational Codes (SOC), which count workers in creative fields regardless of their employer's industry. For example, a graphic designer in a law firm would be counted under an occupation-based study, but not under an industry-based study. SOC data, therefore, provide a measure of how many jobs there are for a particular set of skills.

Creative Columbus: a combined approach

This study examines both creative industries and creative occupations. The only group that is totally excluded is non-creative occupations in non-creative industries. The shaded cells in Figure 2-4 show the categories that provide a starting point for measuring the Central Ohio creative economy.

Figure 2-4. Creative Columbus occupation and industry matrix

	Creative Occupation	Non-Creative Occupation	
Creative Industry	Graphic designer at graphic design firm	Accountant at graphic design firm	**CREATIVE BUSINESSES & ORGANIZATIONS**
Non-Creative Industry	Graphic designer at accounting firm	Accountant at accounting firm	
	CREATIVE WORKFORCE		

Shaded cells are included in the Creative Columbus definition

Fine-tuning industry and occupation selections

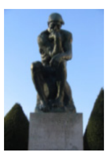
Selecting the sections of the broad matrix to be included in the study was just a first step in the definition of “creative economy.” The next step involved looking at the industry and occupation sub-categories to identify which steps in the “supply chain” are truly creative. In some cases, data limitations prevented fine-grained distinctions between similar businesses and organizations. Because of this, the research also sought local information through interviews, surveys and focus groups.

The supply chain: Elmo vs. The Thinker

A creative economy is not limited to artists, performers, and designers. There are venues such as art galleries and theaters. There are supporting institutions such as arts councils and colleges. Generally speaking, the whole “supply chain” should be taken into account in defining the creative economy. However, this framework becomes difficult to consistently apply as one analyzes individual sectors.

The sculpture and toy industries illustrate this dilemma (Figure 2-5). Many people would instinctively include a local arts council or gallery in the creative economy definition, but what about a large toy factory or Toys R Us? Even this example contains exceptions: sculptures can be mass produced and toys can be high-end, produced in limited quantities, and sold in galleries.

Figure 2-5. Creative economy supply chain framework: sculpture and toy industries

		Who provides resources? ⇨	*Who designs it?* ⇨	*Who makes it?* ⇨	*Who sells it?*
SCULPTURE		**Arts council, foundation, government**	**Sculptor**	**Sculptor**	**Art gallery**
TOY		**Corporation**	**Toy designer**	**Factory (mass production)**	**Toy store**

Photos by Flickr users Conspiracy of Happiness and Zengame

Data limitations: Tip Top vs. IHOP

During the process of conducting interviews and focus groups for this project, many people provided examples of local shops or restaurants that they consider a part of the creative economy. A limitation of the available economic data, however, is that it does not capture these local nuances.

For example, within NAICS, both Tip Top and the International House of Pancakes are the same industry category of Full-Service Restaurants (722110). The 6-digit number is the most detailed level in the NAICS code hierarchy. The data does not differentiate a restaurant like Tip Top, which is a hub of the local creative community, from an IHOP, and most restaurants in code 722110 are more like IHOP. The secondary data analysis, therefore, excluded this and other codes where the overwhelming majority of businesses or organizations are typically not within the creative economy definition.

Photos by Jung Kim and Flickr user srqpix (cropped)

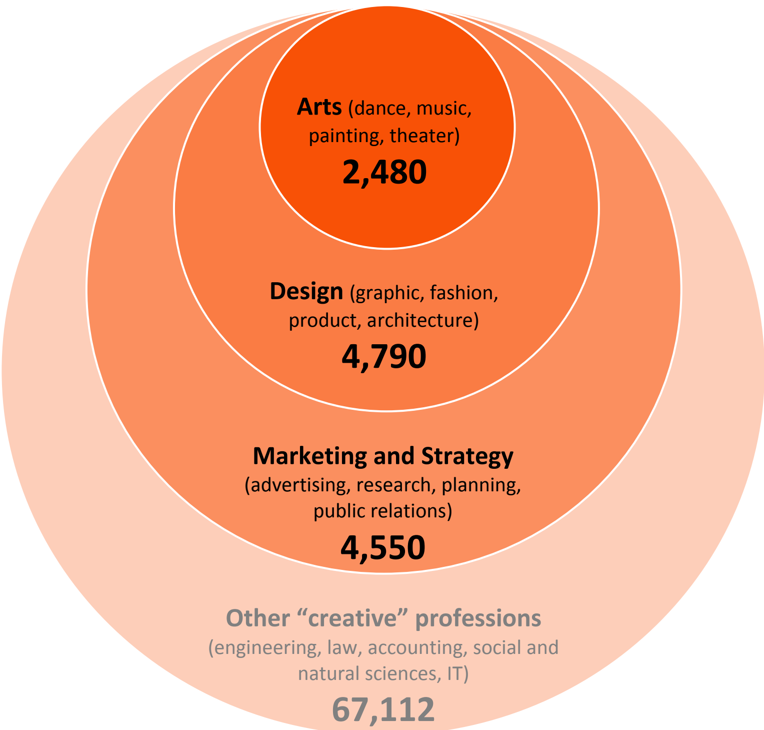
The Creative Columbus definition

The various definitions of “creative economy” produce a wide range of figures for the size of the creative workforce. If Richard Florida’s broad definition is used, there are nearly 79,000 persons in creative occupations in Central Ohio (all four circles in Figure 2-6). Florida asserts that creativity—in its many forms of innovation and craftsmanship—is evident in most professional arenas. With a narrow, primarily arts and design-based definition, the number of people working in creative occupations shrinks to about 7,000 (the inner two circles).

Creative Columbus uses a definition closer to the narrow definition of occupations (the inner three circles on Figure 2-2) than to the very broad one. It includes occupations in the arts, design, and performance industries, as well as in media and marketing. This definition yields a figure of over 11,800 persons working in creative occupations in the Central Ohio. In terms of creative industries (the blue row in Figure 2-4), the Creative Columbus definition counts employment at 18,300.

The lists on the following pages detail the specific industries and occupations included in this total. In general, the study excludes industries and occupations pertaining to construction, production, or maintenance, as well as those based in science or engineering. Likewise, retail industries are excluded from the industry analysis because of the difficulty in distinguishing creative retail from mainstream retail in the data.

Figure 2-6. Workers in creative occupations, Central Ohio, 2006



The three inner circles are included in the Creative Columbus definition; the outer circle of industries is not. Also included, but not shown on the figure above, are creative workers in non-creative industries (i.e., graphic designer in an accounting firm).

Data Source: U.S. Department of Labor, Bureau of Labor Statistics, Occupational Employment Statistics

Specific industries and industry groups

Creative Columbus includes the following 46 industries, selected at the North American Industry Classification System (NAICS 2002) 6-digit level, organized for the purpose of analysis into seven industry groups:

Built Environment

- Architectural Services (NAICS: 541310)
- Landscape Architectural Services (541320)
- Interior Design Services (541410)

Institutions

- Libraries and Archives (519120)
- Fine Arts Schools (611610)
- Museums (712110)
- Historical Sites (712120)
- Nature Parks and Similar (712190)

Marketing

- Marketing Consulting Services (541613)
- Advertising Agencies (541810)
- Public Relations Agencies (541820)
- Media Buying Agencies (541830)
- Media Representatives (541840)
- Display Advertising (541850)
- Direct Mail Advertising (541860)
- Advertising Material Distribution Services (541870)
- Other Services Related to Advertising (541890)
- Marketing Research and Public Opinion Polling (541910)

Media

- Newspaper Publishers (511110)

- Periodical Publishers (511120)
- Book Publishers (511130)
- All Other Publishers (511199)
- Software Publishers (511210)
- Motion Picture and Video Production (512110)
- Teleproduction and Other Postproduction Services (512191)
- Other Motion Picture and Video Industries (512199)
- Record Production (512210)
- Integrated Record Production/Distribution (512220)
- Music Publishers (512230)
- Sound Recording Studios (512240)
- Other Sound Recording Industries (512290)
- Radio Networks (515111)
- Radio Stations (515112)
- Television Broadcasting (515120)
- Internet Publishing and Broadcasting (516110)

Performing Arts

- Theater Companies and Dinner Theaters (711110)
- Dance Companies (711120)
- Musical Groups and Artists (711130)
- Other Performing Arts Companies (711190)
- Independent Artists, Writers, and Performers (711510)

Product Design

- Industrial Design Services (541420)
- Other Specialized Design Services (541490)

Visual Arts

- Art Dealers (453920)
- Graphic Design Services (541430)
- Photography Studios, Portrait (541921)
- Commercial Photography (541922)

Specific occupations and occupation groups

Creative Columbus includes the following 37 specific occupations, as classified by Standard Occupational Codes (SOC), grouped into 15 major categories:

Advertising and Marketing Managers (SOC: 11-2011, 11-2021)

Public Relations Managers and Specialists (11-2031, 27-3031)

Architects, including Landscape (17-1011, 17-1021)

Cartographers and Photogrammetrists (17-1021)

Market and Survey Researchers (19-3020)

Urban and Regional Planners (19-3051)

Art, Drama, Music, and Architecture Teachers, Postsecondary (25-1031, 25-1121)

Artists and Related

- Curators (25-4012)
- Art Directors (27-1011)
- Craft Artists (27-1012)
- Fine Artists, Painters, Sculptors, and Illustrators (27-1013)
- Multi-Media Artists and Animators (27-1014)
- All Other Artists (27-1019)

Designers

- Commercial and Industrial Designers (27-1021)
- Fashion Designers (27-1022)
- Floral Designers (27-1023)

- Graphic Designers (27-1024)
- Interior Designers (27-1025)
- Merchandise Displayers and Window Trimmers (27-1026)
- Set and Exhibit Designers (27-1027)
- All Other Designers (27-1029)

Actors, Producers, and Directors (27-2010)

Dancers and Choreographers (27-2030)

Musicians, Singers, Composers, and Entertainers (27-2040, 27-2099)

News Analysts, Reporters, and Correspondents (27-3020)

Writers and Authors (27-3043)

Photographers (27-4021)

PBR ad on Spring Street, photo by Jung Kim

3. Central Ohio Creative Industries

Warhol exhibit, photo by A.J. Zanyk, courtesy of the Wexner Center

Central Ohio Creative Industries

Preview

Profile of creative industry employers | 3-4

- The 18,303 people employed by Central Ohio creative industry employers represent 2.4% of all private sector employment in the metro area. Half of the creative industry employment is in the media industry.
- The Central Ohio concentration of creative industry employment (0.95 LQ) is slightly below the national figure. The industry groups with the highest concentrations are built environment and product design; those with the lowest are visual arts, marketing, and performing arts.
- The 50 business and industry survey respondents selected a total of 136 major industry categories, with visual arts and marketing the most commonly selected industries.
- In 2006, the creative industry of Central Ohio generated over $3 billion in total business receipts, $932 million in employee income, and $67 million in state and local tax revenues.

Sole proprietors in the creative economy | 3-8

- The Central Ohio creative economy includes 6,930 nonemployer businesses (e.g. sole proprietors), a greater concentration of sole proprietors than in the overall economy. "Independent artists, writers, and performers" make up half of the creative sole proprietors.
- There were 190 self-employed respondents to the Creative Columbus survey, with visual arts and media the most frequently selected industries among this group.
- Of the 306 employee survey respondents, 57% reported doing freelance work or having some other business of their own. Over two-thirds of these identified visual arts as their side industry.

Location of creative industries | 3-11

- Central Ohio creative industries are highly concentrated within the City of Columbus, which contains 61.9% of Central Ohio's creative industry employment as compared to 37.3% of overall employment. The concentration of creative employment in Columbus is due in large part to downtown Columbus (zip code 43215), which is the location of 202 creative industry employers with 3,817 employees
- Dublin, Powell, and Westerville zip codes each have 10% or more of Central Ohio employment in one or more creative industries.
- Downtown Columbus was the most frequent selection for the the location of businesses and organizations by survey respondent, followed by the Short North and Clintonville. Clintonville was the most frequent choice for self-employed respondents.

How creative industries are connected | 3-16

- Many business and organization and self-employed survey respondents conduct business across multiple industries. Visual arts, media, marketing, and digital design form a strongly interconnected cluster.

Customer and supplier linkages | 3-18

- Respondents to the survey indicated that they are more likely to purchase goods and services from within the creative industry and to make sales to individuals and organizations outside of the industry.
- Businesses and organizations reported selling more outside of Central Ohio (39% of sales) than buying from outside the region (27% of purchases). The figures were the inverse for self-employed respondents.

Intersections in the creative economy | 3-23

- The creative industry has a widespread impact on the regional economy. Intersecting industry and occupation data for design and marketing show that most people in these fields work in other, non-creative industries, and that firms in creative fields employ many workers in non-creative occupations.

Profile of creative industry employers

A total of 18,303 people were employed by Central Ohio creative industry employers in 2006 (Table 3-1), representing 2.4% of all private sector employment in the metro area.[1] This does not include persons in non-employer businesses (i.e. sole practitioners), which are discussed separately (see page 3-8).

About half of these workers (9,193) were in the media industry. The next largest industry groups were marketing (3,609) and built environment (2,500). The smallest groups were performing arts and product design. Firms in the media industry were the largest, with average employment of 32 persons, while performing arts, marketing, and visual arts firms had an average of fewer than 10 employees.

Employment concentrations

The location quotient (LQ) is the ratio of the Columbus metro area's share or concentration of a particular industry to the national share. An LQ of 1.0, for example, means that Central Ohio's percentage of workers in a particular industry is the same as the national percentage.

The creative industry's overall 2.4% share of private sector employment in Central Ohio is slightly below the 2.6% share nationwide, and similarly, the concentration of all creative industry employment (0.95 LQ) is slightly below the national figure. The creative industry groups with the highest LQs are built environment and product design; those with the lowest LQs are visual arts, marketing, and performing arts.

However, analysis of employment concentrations for specific industries within these groups reveals industries with concentrations above national figures. These include: television broadcasting (2.64), book publishers (2.42), and periodical publishers (1.86). Dance companies (3.10), historical sites (2.35), and advertising material distribution services (2.11) also have high LQs, but each of these three industries has relatively few employees (<250) in Central Ohio (see also Appendix C).

Table 3-1. Characteristics of creative industry employer firms, Central Ohio, 2006

	Establishments	Employment	% Creative Employment	Location Quotient
All private sector industries	40,577	754,109	-	-
All creative industries	1,368	18,303	100.0%	0.95
Built environment	244	2,498	13.6%	1.28
Institutions	77	1,106	6.2%	0.90
Marketing	438	3,609	19.8%	0.78
Media	283	9,193	50.2%	1.02
Performing arts	70	634	3.3%	0.58
Product design	18	202	1.2%	1.18
Visual arts	238	1,063	5.8%	0.88

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2006; U.S. Census Bureau, County Business Patterns, 2006

[1] Since data on public sector employers is not available across all datasets (notably missing from U.S. Census Bureau's County and Zip Code Business Patterns), the number of establishments, employees, and location quotients in this section are based only on private sector employment data. This excludes local, state, and federal government employers, as well as public colleges and universities, except where otherwise noted. See Section 2, Background and Methods for more information on data sources.

Business and organization survey respondents

The 50 business and industry survey respondents selected a total of 136 major industry categories, with an average of 2 to 3 industries per respondent. Visual arts and marketing were the most commonly selected industries (Table 3-2).

Table 3-2. Business and organization respondents by major industry (n=50)

Major industry category	# of respondents (1)	% of responses
Visual arts	28	56%
Marketing	25	50%
Media	18	36%
Digital design	17	34%
Spatial/built environment	15	30%
Institution	11	22%
Product design	8	16%
Performance arts	7	14%
Literary and language	7	14%
Other (2)	9	18%

Source: CRP, Creative Columbus online survey

(1) *Respondents could select multiple industries from 9 major industry categories*

(2) *Respondents who did not select from the industry choices provided but provided their own industry category*

Of the 52 businesses and organizations that provided information on the number of employees, the largest group (37%) had two to four employees total, including the employer, and 65% had fewer than 50 employees. Only one respondent had over 500 employees (Table 3-3).

Table 3-3. Business and organization respondents by number of employees (n=52)

Number of employees	# of respondents	% of responses
2-4	19	37%
5-9	3	6%
10-19	6	12%
20-49	5	10%
50-99	5	10%
100-249	3	6%
250-499	0	0%
500 or more	1	2%

Source: CRP, Creative Columbus online survey

Nearly half (48%) of the respondents' businesses and organizations were established before 1990. However, there were also many newer businesses, with 1 in 3 established since 2000 (Table 3-4).

Table 3-4. Business and organization respondents by year established (n=61)

Year established	# of respondents	% of responses
Before 1990	29	48%
1990 to 1994	5	8%
1995 to 1999	7	11%
2000 to 2004	11	18%
2005 to 2008	9	15%

Source: CRP, Creative Columbus online survey

Economic value of creative industry employers

In 2006, Central Ohio's creative industry employers generated over $3 billion in total business receipts (i.e. revenue), provided $932 million in employee wages, and paid $67 million in state and local tax revenues (Table 3-5). These figures do not include the economic multiplier effect on other industries that benefit from expenditures by creative industry businesses and employees. Nor do they comprise the full tourism impact generated by the creative industry's arts- and entertainment-related industries. While these additional impacts are difficult to calculate, it is clear that the full economic value of creative industries to the central Ohio economy is significant.

Table 3-5. Annual creative industry business receipts, employee wages, and tax revenue, Central Ohio, 2006

	Receipts ($000)	Wages ($000)	State income tax ($000)	State sales tax ($000)	State commercial activity tax ($000)	Local income tax ($000)	Local sales tax ($000)	Total tax revenue ($000)
All private sector industries	**111,619,808**	**30,696,761**	-	-	-	-	-	-
All creative industries	**3,044,773**	**932,167**	25,922	13,535	7,916	16,089	3,079	**66,541**
Built environment	**369,209**	**149,165**	4,475	2,166	960	2,575	493	**10,669**
Institutions	**67,609**	**21,501**	163	312	176	371	71	**1,093**
Marketing	**596,611**	**181,346**	5,017	2,633	1,551	3,130	599	**12,930**
Media	**1,808,323**	**511,250**	14,764	7,423	4,702	8,824	1,689	**37,402**
Performing arts	**56,149**	**20,214**	373	294	146	349	67	**1,229**
Product design	**25,511**	**9,896**	258	144	66	171	33	**672**
Visual arts	**121,362**	**38,796**	871	563	316	670	128	**2,548**

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2006; U.S. Census Bureau, Economic Census, 2002, County Business Patterns, 2006; Columbus Chamber of Commerce (composite tax rates); Ohio Department of Taxation, 2006 (state income tax rates)

Note: CRP calculated the economic value using a methodology provided by the Columbus Chamber of Commerce. For more information on the methodology, see Appendix B.

Creative industry wages

Overall, the creative industry has an average annual wage about $10,000 higher than the average for all Central Ohio industries (Table 3-6). This difference is in part a result of the influence of media employment, which is half of overall creative industry employment.

Industries in the built environment ($59,714) and media ($55,613) had the highest average wages in 2006. Arts and cultural institutions had the lowest average at $19,440. These industry wages are the average of all occupations within each industry, from management to hourly workers, in both creative and non-creative job functions.

Table 3-6. Average annual wage by industry, Central Ohio, 2006

	Average annual wage
All private sector industries	$40,706
All creative industries	$50,930
Built environment	$59,714
Institutions	$19,440
Marketing	$50,248
Media	$55,613
Performing arts	$31,883
Product design	$48,990
Visual arts	$36,497

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2006; U.S. Census Bureau, County Business Patterns, 2006

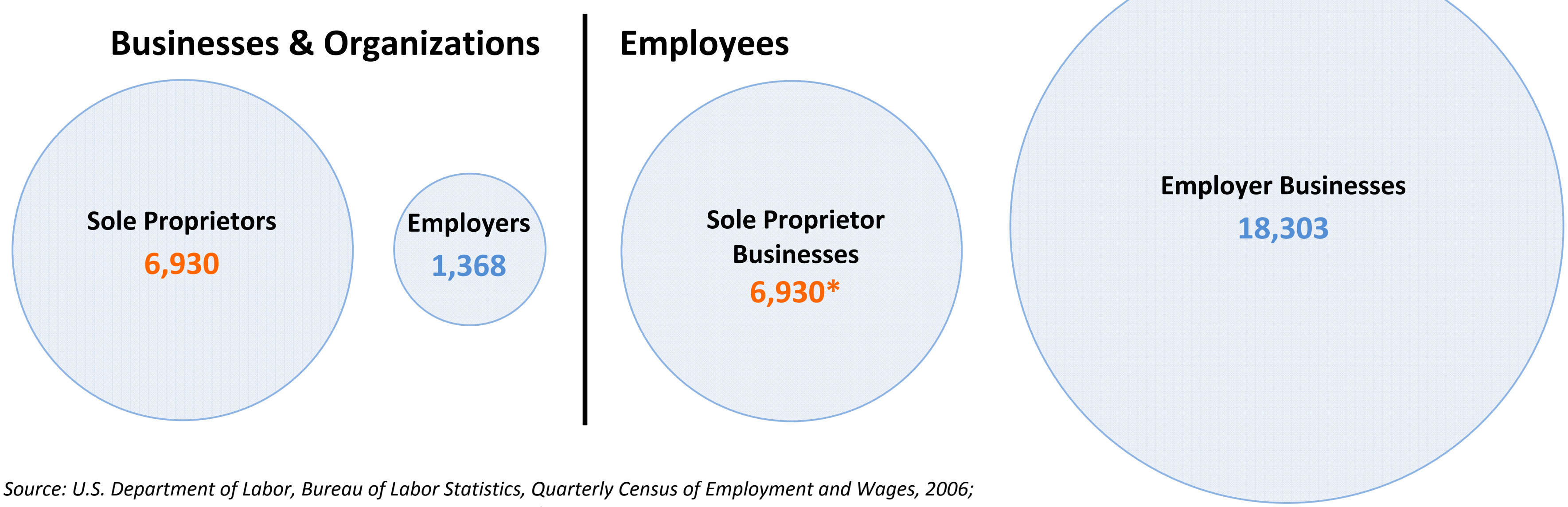
ComFest, photo by Kenny Ruffin

Sole proprietors in the creative economy

A business in the creative economy is more likely to be a sole proprietor (also referred to in this report as "self-employed" and "freelancer") than in the overall economy. The 6,930 creative industry sole proprietors in Central Ohio represent 5.7% of all sole proprietors in the region. In comparison, the region's 1,368 creative industry employer businesses and organizations represent only 3.4% of all employers.

The difference in the creative industry's share of sole proprietors versus its share of employers is similar nationwide, where the figures are also 5.7% and 3.4% respectively. Although sole proprietors outnumber employer businesses and organizations 5-to-1 in the creative industry, the employer businesses and organizations represent over 18,000 employees (Figure 3-1).

Figure 3-1. Central Ohio's creative industry employers and sole-proprietors, 2006



Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2006; U.S. Census Bureau, County Business Patterns, 2006, Nonemployer Statistics, 2006

*This represents the base estimate of persons working in "sole proprietor" businesses. Since they often have other people working or partnering with them who are not employees, a 1-to-1 ratio to calculate the number of workers may be conservative.

Characteristics of sole proprietors

"Independent artists, writers, and performers" make up half of Central Ohio's creative sole proprietors (Table 3-7). Specialized design services—interior design, industrial design, and graphic design–is the next largest group. Appendix G has additional data on creative nonemployer businesses.

Table 3-7. Industry of creative sole proprietors, Central Ohio, 2006

Industry groups	Sole proprietors	% Creative sole proprietors
Total sole proprietors	121,810	
All creative industry sole proprietors	6,930	100.0%
Independent artists, writers, and performers	3,474	50.1%
Specialized design services	1,143	16.5%
Advertising and related services	722	10.4%
Photographic services	629	9.1%
Performing arts companies	266	3.8%
Architectural services	265	3.8%
Landscape architectural services	227	3.3%
Marketing research and public opinion polling	121	1.7%
Art dealers	83	1.2%

Source: U.S. Census Bureau, Nonemployer Statistics, 2006

Self-employed survey respondents

In the Creative Columbus survey, 190 respondents were self-employed individuals, nearly triple the 66 respondents who responded on behalf of a business or organization. Among self-employed individuals, 172 respondents selected 542 major industry categories. Visual arts and media were the most frequently selected industries among this group (Table 3-8).

Table 3-8. Self-employed individuals, respondents by major industry (n=172)

Major industry category	# of respondents (1)	% of responses
Visual arts	123	72%
Media	97	56%
Marketing	81	47%
Institution	58	34%
Digital design	47	27%
Performance arts	45	26%
Literary and language	42	24%
Spatial/built environment	27	16%
Product design	22	13%
Other (2)	47	27%

Source: CRP, Creative Columbus online survey

(1) Respondents could select multiple industries from 9 major industry categories

(2) Respondents who did not select from the industry choices provided but provided their own industry category

The businesses of self-employed individuals who responded to the survey were newer than the employer businesses. Nearly half (48%) began working in their field since 2000, compared to only 24% who reported working in their field prior to 1990 (Table 3-9).

Table 3-9. Self-employed individuals, respondents by year they started working in their industry (n=169)

Year	# of respondents	% of responses
Before 1970	2	1%
1970s	9	5%
1980s	31	18%
1990s	46	27%
2000s	81	48%

Source: CRP, Creative Columbus online survey

Employees as freelancers

Data from the employee survey add further evidence for the prevalence of sole proprietors. The majority of respondents who were an employee of a creative industry business or organization (57%) reported doing freelance work or having some other business of their own, while 7% had a second job with another creative business or organization.

In the survey, over two-thirds of the employees who did side work identified visual arts as their side industry (Table 3-10). This figure is higher than the 50% for visual arts as the employees' main job. Performance and literary arts were also overrepresented in side work (19% and 16% respectively) compared to their main employment (13% and 11%).

Table 3-10. Industries of main employment and side work, employee survey respondents

Respondent-identified industry	**Industry of main employment** (n=306)	**Industry of side work** (n=182)
Visual arts	50%	68%
Institutional	48%	20%
Marketing	47%	28%
Media	35%	29%
Digital design	28%	21%
Performance arts	13%	19%
Spatial/built environment	12%	7%
Literary and language	11%	16%
Product design	9%	5%
Other	15%	-

Source: CRP, Creative Columbus online survey

Economic value of creative sole proprietors

While often not the primary source of income for their proprietors, these creative small businesses have a significant impact on the local economy. Total business receipts from the nearly 7,000 sole proprietors in the creative economy in Central Ohio, as reported to the IRS, totaled over $170 million in 2006.

Location of creative industries

Just as Central Ohio has higher or lower concentrations of creative industries compared to the U.S., there are also variations within the 8-county region. Figures 3-2 and 3-3 and Tables 3-12 and 3-13 show zip code-level data on creative industry employers and employment in Central Ohio. These location quotients (LQ) show the extent to which creative establishments and employment are concentrated within Central Ohio zip codes and communities, compared to their concentration in the entire metro area.

City of Columbus

Central Ohio creative industries are highly concentrated within Columbus city, which contains 61.9% of the region's creative industry employment as compared to 37.3% of overall employment, for a LQ of 1.62. Concentration in Columbus is greatest for performing arts (88.5% is located in the city), media (73.6%) and the built environment (58.0%).

Downtown Columbus

The concentration of creative employment in Columbus is due in large part to downtown Columbus (zip code 43215), which is the location of 202 creative industry employers with 3,817 employees (Table 3-11). One-fifth of Central Ohio's creative industry employment (19.5%) is concentrated in downtown Columbus, compared to only 6.3% of the region's overall employment. This yields a location quotient of 3.11. This downtown clustering is even greater for specific industries—71% of employment in performing arts, 41% of employment in built environment, and 20% of employment in arts and cultural institutions are located downtown.

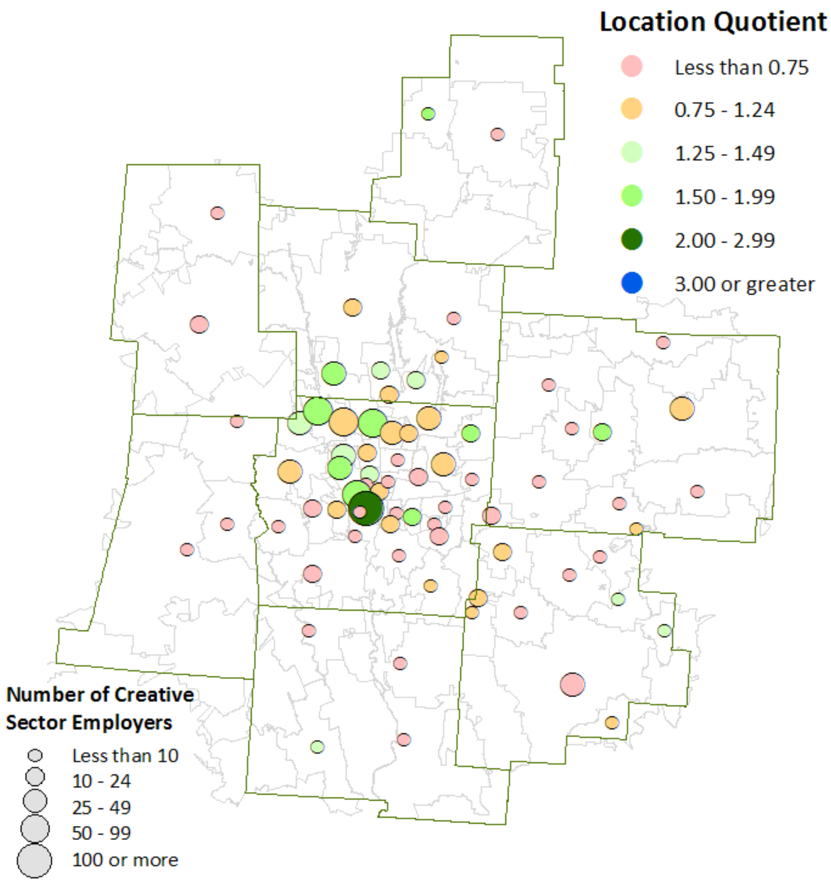
Table 3-11. Creative industry employer establishments and employment by community, Central Ohio, 2006

Location (1)	**Creative Sector Establishments**		**Creative Sector Employment**	
	#	**LQ (1)**	**#**	**LQ**
Downtown Columbus	202	2.32	3,817	3.11
Lewis Center	19	1.36	380	2.10
Upper Arlington	86	1.65	838	1.99
Powell	40	1.77	275	1.72
Granville	16	1.89	141	1.70
Grandview	51	1.89	430	1.67
Worthington	50	1.52	543	1.49
Groveport	8	0.81	278	1.40
Columbus (excluding Downtown)	294	0.66	8,312	1.33
Dublin	122	1.62	1,483	1.32
Westerville	69	1.13	800	1.18
Hilliard	37	1.05	389	0.96
New Albany	22	1.86	135	0.87
Newark	34	0.85	348	0.73
Bexley	24	1.51	102	0.67
Gahanna	42	1.18	261	0.59
Delaware	24	0.82	122	0.42
Lancaster	26	0.56	176	0.38
Marysville	13	0.63	70	0.24

Source: U.S. Census Bureau, Zip Code Business Patterns, 2006

(1) Data are for zip codes, which do not exactly conform to jurisdication boundaries.

Figure 3-2. Creative industry employer establishment location quotients, Central Ohio zip codes, 2006



Source: U.S. Census Bureau, Zip Code Business Patterns, 2006

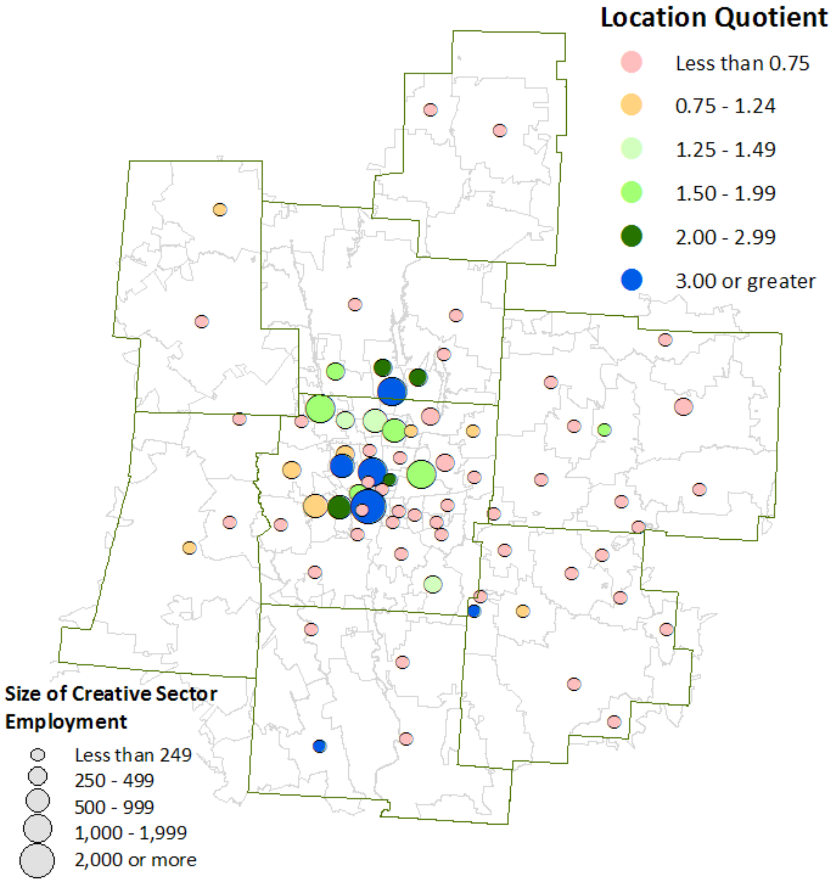
Table 3-12. Zip codes with highest creative industry employer establishment location quotients, 2006 (1)

Zip Code (Area)	Creative Sector Employers	LQ
43215 (Columbus-Downtown)	202	2.32
43221 (Upper Arlington)	44	1.94
43023 (Granville)	16	1.89
43212 (Grandview Hts.)	51	1.89
43054 (New Albany)	22	1.86
43065 (Powell)	40	1.77
43017 (Dublin)	91	1.74
43085 (Worthington)	50	1.52
43209 (Bexley)	24	1.51
43202 (Columbus-North of OSU)	15	1.47
43220 (Upper Arlington)	42	1.42
43082 (Westerville)	22	1.40

Source: U.S. Census Bureau, Zip Code Business Patterns, 2006

(1) Minimum 25 overall employers in zip code

Figure 3-3. Creative industry employment location quotients, Central Ohio zip codes, 2006



Source: U.S. Census Bureau, Zip Code Business Patterns, 2006

Table 3-13. Zip codes with highest creative industry employment location quotients, 2006 (1)

Zip Code (Area)	Creative Sector Employment	LQ
43202 (Columbus-North of OSU)	1,409	11.55
43240 (Columbus-Polaris)	1,644	4.97
43221 (Upper Arlington)	521	3.15
43215 (Columbus-Downtown)	3,817	3.11
43211 (Columbus-South Linden)	177	2.63
43204 (Columbus-Hilltop)	637	2.56
43216 (Columbus-Franklinton)	175	2.51
43082 (Westerville)	496	2.26
43035 (Lewis Center)	380	2.10
43229 (Columbus-Northland)	957	1.86
43065 (Powell)	275	1.72
43023 (Granville)	141	1.70

Source: U.S. Census Bureau, Zip Code Business Patterns, 2006

(1) Minimum 25 overall employers in zip code

Employment concentrations outside of Columbus

Outside the city of Columbus, eight communities have at least five percent of metro area employment in one of the creative sector industry groups (Table 3-14).

Table 3-14. Concentrations of creative industry employment, selected Central Ohio communities, 2006

Community	Percent Central Ohio creative industry employment
Dublin	21.8%--built environment 14.7% --visual arts 9.8% --marketing
Powell	18.0% --institutions
Westerville	17.0%--marketing
Worthington	6.8%--marketing
New Albany	5.6%--visual arts
Upper Arlington	5.6% --media
London	5.5% --visual arts
Lewis Center	5.4%--marketing

Source: U.S. Census Bureau, Zip Code Business Patterns, 2006

Location of large employers

A high employment LQ may result from either several businesses in proximity to each other or the presence of a single large employer. Central Ohio has ten creative employers with 250 or more employees; Columbus has seven, and Dublin, Upper Arlington, and Westerville each have one. Zip code 43240 (Polaris) is the sole zip code with multiple creative industry employers of this size. Hilliard, Lewis Center, Newark, Powell, and Worthington have creative industry employers with 100 employees or more. Eight of Central Ohio's ten largest creative employers are in the media industry.

Location of sole proprietors

Creative industry sole proprietors, much like employer establishments, are concentrated in the center of Central Ohio, with 73% of the 6,930 located in Franklin County. Four of Central Ohio's eight counties (Madison, Morrow, Pickaway, and Union) have fewer than 100 nonemployer businesses in the creative industries.

Geographic locations of survey respondents

Survey results generally confirmed the analysis of the government data that showed downtown Columbus as a major hub of the creative economy. Downtown was the most frequent selection for the location of businesses and organizations, followed by the Short North and Clintonville. Among self-employed individuals, Clintonville was the most frequent choice. Of the employees who responded to the survey, 41% work in downtown Columbus, even though only 3% live downtown.

The largest numbers of students who responded to the survey attend the Ohio State University, followed by the Columbus College of Art & Design. As would be expected, the OSU area and downtown are also the locations where the largest numbers of student survey respondents live (Table 3-15). These numbers were likely influenced by outreach done through those two schools to encourage survey participation.

Table 3-15. Geographic locations where survey respondents live and work

Top 5 areas where businesses and organizations are located (66 responses)	**Top 5 areas where self-employed individuals conduct their work** (190 resp.)
• Downtown (39%)	• Clintonville (17%)
• Short North (11%)	• Downtown (11%)
• Clintonville (8%)	• Delaware (11%)
• Westerville (6%)	• Short North (7%)
• 4-way tie: Delaware County, Gahanna, Polaris, Port Columbus area (5%)	• Worthington (6%)
Top 5 areas where employees work (278 responses)	**Top 5 areas where employees live** (282 responses)
• Downtown (41%)	• Clintonville (16%)
• OSU area (11%)	• Delaware County (8%)
• Westerville (5%)	• Short North (6%)
• Delaware County (5%)	• Grandview Heights (6%)
• Grandview Heights (5%)	• Westerville (6%)
Institutions attended by students (304 responses)	**Top 5 areas where students live** (279 respondents)
• OSU (51%)	• OSU area (27%)
• CCAD (46%)	• Downtown (19%)
• Other (3%)	• Short North (6%)
	• Clintonville (5%)
	• Delaware County (5%)

Source: CRP, Creative Columbus online survey

How creative industries are connected

The survey data shows that many creative firms and organizations have multiple functions, for example a combination of graphic design, web publishing, and media. While the secondary data sources assign a single industry code to a business, the Creative Columbus survey allowed respondents to select multiple fields. The results gave some insight of how industries within the creative economy are interrelated.

The industry matrix

Figure 3-4 on the following page provides information, based on information provided by survey respondents, about how creative industries in central Ohio are linked.

Reading down columns:

Businesses and organizations across creative industries most often identified visual arts, media, and marketing as other fields in which they were involved. Nearly half (48%) of businesses and organizations in performing arts, and 88% in digital design, also chose visual arts. An industry like product design, for example, was far less connected to other industries, ranging from 13% to 26%.

Reading across rows:

Relationships between industries are not reciprocal. Visual arts, media, and marketing were common secondary choices, but firms in those industries were not as likely to select other industries as secondary choices. For example, while 48% of performing arts respondents also selected visual arts, only 17% in visual arts selected performing arts. Inversely, product design and spatial/built environment were less common as secondary choices, but firms in those industries were more likely to select other industries as secondary choices.

Reading down columns and across rows:

When the table is viewed both ways, an interconnected cluster emerges among visual arts, media, marketing, and digital design. A business or organization working in one of these industries was likely to select one or more of the other three.

These patterns of multiple identities correspond with anecdotal information received in the course of project outreach. Artists, photographers, and others noted that they do multiple things to maintain their businesses. This may reflect the market characteristics of Central Ohio in comparison to a larger metro area. For example, the sheer number of professional photographers in New York City may require one to be a specialist (e.g. architectural photography). In New York, sufficient demand exists to support these specialists. In Columbus, the photographer has to be more of a generalist to maintain a client base, and the local competition is, therefore, with other generalists.

Figure 3-4. Industry matrix: fields of business and organization and self-employed survey respondents

Percent of businesses, organizations and self-employed individuals who chose a field in this sector…	…that also selected a field in this sector.								
	Institution	Visual Arts	Perf. Arts	Media	Marketing	Digital Design	Product Design	Spatial & Built Env.	Literary & Language
Institution	100%	74%	35%	51%	43%	28%	13%	22%	30%
Visual Arts	34%	100%	17%	58%	50%	37%	15%	22%	23%
Perf. Arts	46%	48%	100%	46%	33%	13%	13%	10%	40%
Media	30%	77%	21%	100%	69%	46%	15%	19%	31%
Marketing	28%	72%	16%	75%	100%	47%	19%	26%	29%
Digital Design	30%	88%	11%	83%	78%	100%	20%	27%	30%
Product Design	30%	73%	23%	57%	67%	43%	100%	37%	33%
Spatial & Built Env.	36%	79%	12%	52%	67%	40%	26%	100%	29%
Literary & Language	43%	71%	43%	73%	63%	39%	20%	24%	100%

Source: CRP, Creative Columbus online survey

Customer and supplier linkages

Respondents to the Creative Columbus survey indicated that they were more likely to purchase goods and services from within the creative industry and to make sales to individuals and organizations outside of the industry. Businesses, organizations, and self-employed individuals were asked to describe their suppliers and contractors, customers, and clients. Businesses and individuals in fields similar to those of the respondent were more often identified as suppliers than as customers. The relationship that creative industries reported with businesses in other fields was fairly equally balanced between suppliers and customers. The general public and the non-profit and public sectors were more frequently identified as customers than as suppliers (Table 3-16).

Table 3-16. Customer and supplier linkages of businesses, organizations, and self-employed individuals

	Other businesses in your field or similar field	Individuals working in your field or similar field	Arts institutions	Businesses in other fields	Professional organizations	Government agencies	Non-profit community organizations	General public	Corporate or non-profit foundations
Business/Organization: Customers (n=45)	31%	18%	4%	67%	24%	31%	31%	33%	51%
Business/Organization: Suppliers (n=43)	42%	37%	12%	63%	9%	9%	12%	14%	12%
Self-employed: Customers (n=147)	29%	31%	14%	43%	18%	5%	18%	51%	23%
Self-employed: Suppliers (n=117)	56%	35%	12%	40%	14%	3%	12%	21%	9%

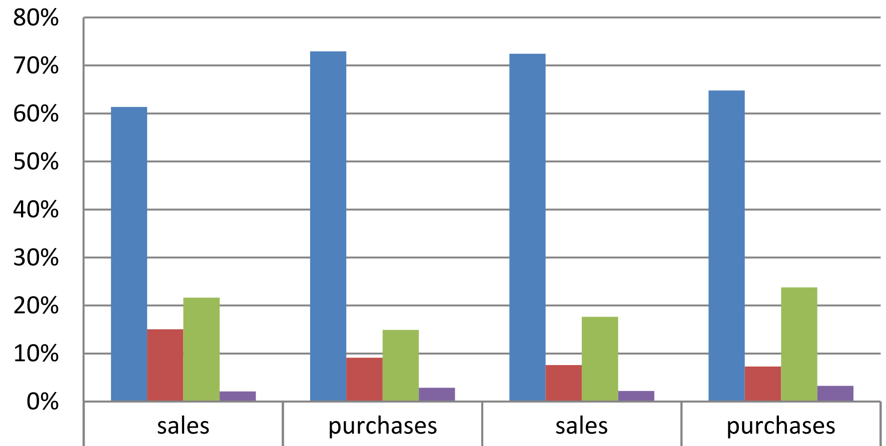
Source: CRP, Creative Columbus online survey

Economic linkages outside Central Ohio

The survey data provides information about the geographic patterns of the sales and purchases of the Central Ohio creative economy. Overall, 61% to 73% of all sales and purchases, in terms of dollar value, were reported to be made within Central Ohio.

Businesses and organizations reported selling more to outside of Central Ohio (an average of 39% of sales) than buying from outside the region (27% of purchases). Among self-employed individuals, the ratio was nearly the inverse, with 28% of sales within Central Ohio and 35% of purchases from outside of the region (Chart 3-1).

Chart 3-1. Locations of sales and purchases of survey respondents (1)



	Businesses & organizations: sales	Businesses & organizations: purchases	Self-employed individuals: sales	Self-employed individuals: purchases
Central Ohio	61%	73%	72%	65%
Rest of Ohio	15%	9%	8%	7%
Rest of U.S.	22%	15%	18%	24%
Outside U.S.	2%	3%	2%	3%

Source: CRP, Creative Columbus online survey

(1) Businesses and organizations, sales n=43, purchases n=40; Self-employed individuals sales n=134 purchases n=106

Economic linkages within Central Ohio

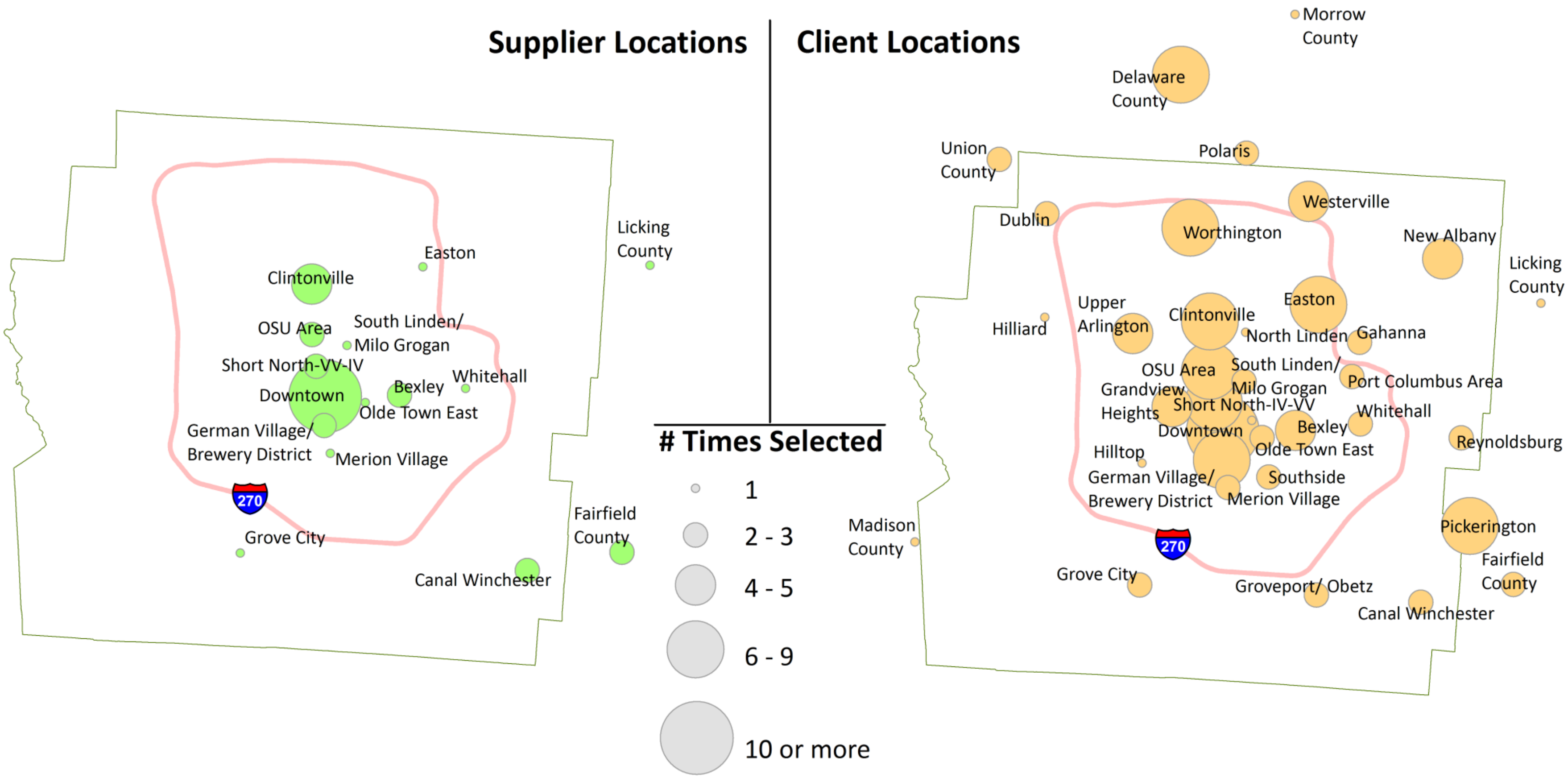
For supply chain relationships within Central Ohio, businesses, organizations, and self-employed individuals tended to buy goods and services in a more localized pattern compared to how they sold. Respondents in those groups were asked to select the top 3 areas for both their expenditures and revenues/income. The objective was to see how this correlated with the location of the respondent.

For downtown Columbus and Clintonville, there were enough survey responses to draw some interpretations (see Figures 3-5 and 3-6 on the next two pages). In both areas, the local suppliers were more concentrated in and around the respondents' location. The local clients were also concentrated but not to the same extent. Survey respondents identified suburban areas more frequently for their client base.

Downtown businesses and organizations were more downtown-centric in their local supply chain relationships than their Clintonville counterparts were Clintonville-centric. For example, on the client side, Clintonville respondents were about as likely to select downtown, the Short North, and the OSU area as their own neighborhood.

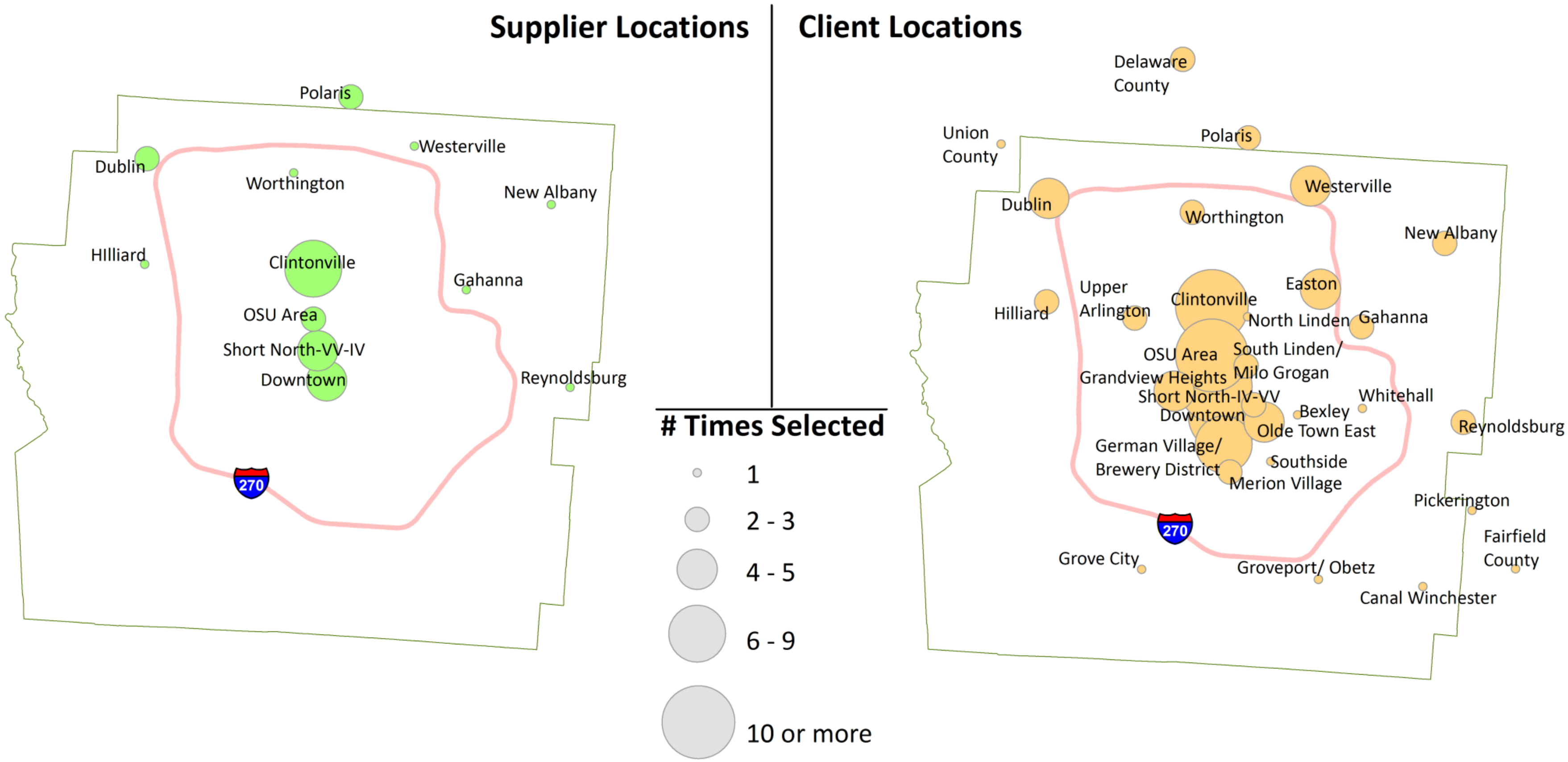
Urban Scrawl, photo by Lisa Dowell

Figure 3-5. Location of primary local suppliers and clients for creative industry employers and self-employed individuals based in downtown Columbus



Source: Community Research Partners, Creative Columbus online survey

Figure 3-6. Location of primary local suppliers and clients for creative industry employers and self-employed individuals based in Clintonville



Source: Community Research Partners, Creative Columbus online survey

Intersections in the creative economy

The arts, design, media, and marketing industries employ many people who are not in traditional creative occupations. Examples include administration, finance, legal, IT, maintenance, security, and transportation. Similarly, businesses and organizations outside the creative industry employ people in creative occupations, such as graphic design, marketing, and writing.

The industry-occupation matrices (Figures 3-7 and 3-8) are cross-tabulation of industries and occupations for two creative industry groups—design and marketing. The National Matrix of industries and occupations was used to estimate how employment is allocated between creative and non-creative industries and occupations.

The resulting analyses show how diffuse the creative economy can be within the overall economy. The number of designers working in design firms or the number of marketing people working in marketing-related firms is small compared to the numbers in those fields working for other types of businesses. Even within the design or marketing firms, the people who would be considered the creative core of those businesses are outnumbered by people doing other activities.

Specialized design services

Specialized design services, which include industrial, interior, graphic, fashion, and other design firms, employ an estimated 863 people in Central Ohio. Among them 43% are designers, 6% are other creative occupations, and 51% are noncreative occupations. The designers working in design firms represent only 13% of Central Ohio's 2,890 design workforce.

Figure 3-7. Specialized design services industry-occupation matrix (1)

	Design Occupations	Non-Design Occupations	
Design Industries	**375**	**488** (51 other creative occupations, 437 non-creative occupations)	863
Other Industries	**2,515**		
	2,890		

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment Projections - National Matrix, Occupational Employment Statistics, and Quarterly Census of Employment and Wages, 2006

(1) This matrix includes occupations in both the public and private sectors, so data are not comparable to the other employment data in this section, which are for private sector employers only.

Marketing

Compared to design, marketing is more pronounced in the diffusion of the workforce. Only 10% of the marketing industry's 3,608 employees in Central Ohio are in marketing and advertising occupations, which include advertising and marketing managers, market researchers, and public relations managers and specialists, while 11% are in other creative occupations, and 79% are in noncreative occupations. Nearly 9 in 10 (87%) of Central Ohio's 2,640 marketing professionals are employed by firms whose primary industry is not marketing.

Figure 3-8. Marketing industry-occupation matrix (1)

	Marketing Occupations	Non-Marketing Occupations	
Marketing Industries	**345**	**3,263** (386 other creative occupations; 2,877 non-creative occupations)	**3,608**
Other Industries	**2,295**		
	2,640		

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment Projections - National Matrix, Occupational Employment Statistics, and Quarterly Census of Employment and Wages, 2006

(1) This matrix includes occupations in both the public and private sectors, so data are not comparable to the other employment data in this section, which are for private sector employers only.

4. Central Ohio Creative Talent

Photo courtesy of GCAC

4. Central Ohio Creative Talent

Preview

Composition of the creative workforce | 4-4

- Central Ohio has over 11,000 people in the creative workforce. The largest creative occupational group is specialized designers (3,750 jobs), which includes graphic, interior, commercial/industrial, fashion, and floral other designer occupations.
- The 306 employee survey respondents selected 820 major industry categories. Visual arts and arts and cultural institutions were the most frequently selected industries among this group.

Clusters of creative workers | 4-6

- Central Ohio has high occupation concentrations of several design fields (graphic, commercial/industrial, fashion) and of musicians and singers.
- Central Ohio has relatively low concentrations of actors, producers, and directors; and writers and authors.

Creative workforce throughout the economy | 4-7

- Creative occupations are found within many noncreative industries. For example, data for the U.S. indicates that 6 in 10 graphic designers work in industries other than design, advertising, and publishing.

Hiring trends | 4-8

- Of 40 business and organization respondents, 60% added jobs in the past year, while 7.5% cut jobs. In the year ahead, 55% anticipated adding jobs, and none anticipated cutting jobs, at the time of the survey.

Attracting and retaining talent | 4-8

- Of 431 survey respondents, 37% agreed with the statement "Central Ohio is attracting and retaining talented people in my field," while 23% disagreed.
- School and work or business opportunities were the top reasons cited by employee survey respondents who had moved to Central Ohio. Only 8% said they moved to Central Ohio on the basis of hearing positive things about the region.
- The top two factors for attracting and retaining talented people in Central Ohio, as cited by survey respondents, were employment opportunties and the presence of a creative community.

Creative talent skills gaps | 4-10

- Businesses and organizations and self-employed individuals identified lack of general job skills, such as project management, problem solving, and communications, as the greatest skill gaps in recruitment and contracting.

Educating the future creative workforce | 4-11

- Making education more affordable was selected by nearly 2 of 3 students as a way that education of the creative workforce can be improved, versus 32% of businesses and organizations, and 43% of self-employed individuals.
- Businesses and organizations and self-employed individuals most frequently selected “programs and classes that better simulate the work environment” at 74% and 60% respectively, compared to only 35% of students.
- Over one-third of self-employed individuals (35%) selected the need for more classes at non-traditional times and locations.

Composition of the creative workforce

The Central Ohio creative workforce had 11,820 employees holding creative occupations in 2006 (Chart 4-1). The occupational employment counts in this section do not include sole proprietors and other nonemployer businesses.

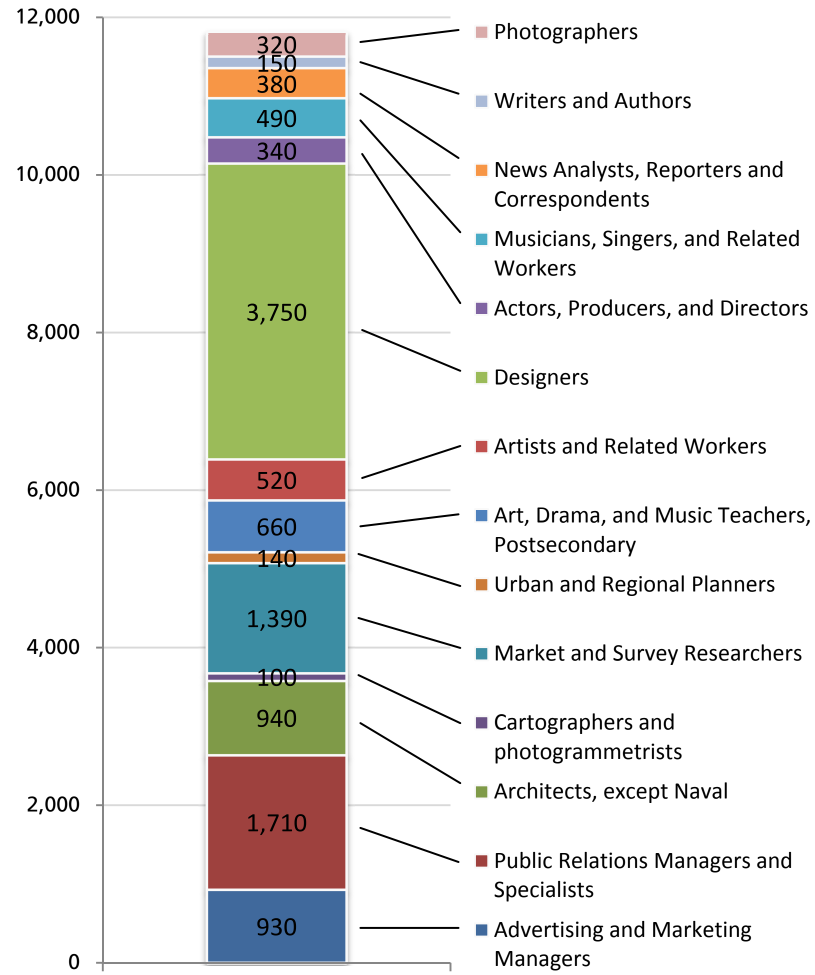
By far the largest occupational group is specialized designers (3,750 jobs), including:

- 1,570 graphic designers
- 620 interior designers
- 530 commercial or industrial designers
- 390 fashion designers
- 320 floral designers

Among the region's creative workforce, public relations specialist (1,530) and market research analyst (1,150) are the only occupations other than graphic designer with more than 1,000 employees.

Certain occupations, such as dancers, composers, and architecture professors, had so few employees in Central Ohio that employment estimates were not generated.

Chart 4-1. Creative occupations, Central Ohio, 2006



Source: U.S. Department of Labor,Bureau of Labor Statistics, Occupational Employment Statistics

Employee survey respondents

Another picture of the creative workforce is provided by the employees in creative occupations and industries who responded to the Creative Columbus survey. The 306 respondents selected 820 major industry categories. Visual arts and media were the most commonly selected industries among this group (Table 4-1).

Table 4-1. Employee respondents by major industry (n=306)

Major industry category	# of respondents (1)	% of responses
Visual arts	152	50%
Media	106	35%
Marketing	145	47%
Institution	146	48%
Digital design	87	28%
Performance arts	40	13%
Literary and language	34	11%
Spatial/built environment	37	12%
Product design	27	9%
Other (2)	46	15%

Source: CRP, Creative Columbus online survey

(1) Respondents could select multiple industries from 9 major industry categories

(2) Respondents who did not select from the industry choices but provided their own industry category

Via Colori, photo by Jung Kim

Clusters of creative workers

The percentage of overall Central Ohio employment that is part of the creative workforce (1.30%) is slightly less than the national figure (1.42%), yielding a location quotient (LQ) of 0.91 for the local creative workforce (Table 4-2).

In Central Ohio the design fields are the creative occupations with the greatest workforce concentrations (high LQs):

- Fashion designers (3.62)
- Commercial/industrial designers (2.30)
- Interior designers (1.72)
- Musicians and singers (1.31)

Central Ohio occupations with low LQs include:

- Actors, producers, and directors (0.43)
- Writers and authors (0.50)
- Urban and regional planners (0.62)
- Advertising and marketing managers (0.68)

Table 4-2. Central Ohio creative occupations by location quotient, 2006

Occupations	Employment	Location Quotient
All creative workforce occupations	11,820	0.91
Cartographers and photogrammetrists	100	1.27
Designers	3,750	1.25
Fashion designers	390	3.62
Commercial and industrial designers	530	2.30
Interior designers	620	1.72
Graphic designers	1,570	1.20
Floral designers	330	0.78
Art, drama, music, architecture postsecondary teachers	660	1.23
Architects, including landscape	940	1.11
Public relations managers and specialists	1,710	0.98
News analysts, reporters and correspondents	380	0.92
Market and survey researchers	1,390	0.85
Artists, art directors, and curators	520	0.83
Photographers	320	0.77
Advertising and marketing managers	930	0.68
Urban and regional planners	140	0.62
Musicians, singers, composers, and entertainers	490	0.62
Musicians and singers	420	1.31
Writers and authors	150	0.50
Actors, producers, and directors	340	0.43
Dancers and choreographers	NA	NA

Source: U.S. Department of Labor, Bureau of Labor Statistics, Occupational Employment Statistics,2006 and 2007

Creative workforce throughout the economy

As noted in Section 3 Creative Industries, a high percentage of creative occupations are within noncreative industries. The contributions of the creative workforce benefit a wide variety of employers. The pervasiveness of the creative workforce throughout the economy is well illustrated by the dispersion of graphic designers. There are 1,570 graphic design employees and an estimated 1,500 graphic design freelancers in Central Ohio.

In the U.S., as would be expected, specialized design, advertising, and publishing industries account for a substantial share (41%) of jobs in the graphic design field. However, nearly 6 in 10 graphic designers work in other industries (Table 4-3). For example, manufacturing industries provide employment for 18.9% of graphic designers nationwide, and at least 3.0% of graphic designers have found employment within each of the following industries:

- Wholesale trade
- Retail trade
- Architectural or engineering services
- Computer systems design services
- Waste management or remediation services

Table 4-3. Graphic designers by industry in the U.S., 2006

Industry	U.S. Graphic Design Employment	% of Graphic Design Employment
Total wage and salary employment	194,535	100.0%
Manufacturing	36,823	18.9%
Paper manufacturing	2,316	1.2%
Printing and related support activities	18,058	9.3%
Miscellaneous manufacturing	7,233	3.7%
Wholesale trade	8,959	4.6%
Retail trade	7,351	3.8%
Information	36,549	18.8%
Publishing industries (except Internet)	27,966	14.4%
Finance and insurance	2,166	1.1%
Professional, scientific, and technical services	73,477	37.8%
Architectural, engineering, and related services	6,322	3.2%
Specialized design services	28,436	14.6%
Computer systems design and related services	7,169	3.7%
Management, scientific, and technical consulting	5,228	2.7%
Advertising and related services	22,967	11.8%
Management of companies and enterprises	4,136	2.1%
Administrative and support and waste management and remediation services	5,779	3.0%
Educational services, public and private	5,656	2.9%
Government	4,055	2.1%
All other	9,582	4.9%

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment Projections - National Matrix, 2006

Hiring trends

Forty businesses and organizations survey respondents provided information about their hiring patterns in the past year and what they anticipate in the year ahead (Table 4-4). Of the 40 respondents, 60% added jobs in the past year, while 7.5% cut jobs. In the year ahead, 55% anticipate adding jobs, and none anticipated cutting jobs at the time of the survey. However, while 6 respondents added 10 or more jobs in the past year, only 3 anticipated adding that many in the upcoming year.

Table 4-4. Hiring trends, businesses and organizations (n=40)

Number net new employees	Past year	Upcoming year
Cut jobs	3	0
None	13	18
Add jobs	24	22
1-2	7	9
3-4	6	8
5-9	1	0
10-14	3	1
15-19	1	0
20-29	1	2
30-39	0	0
40+	1	0

Source: CRP, Creative Columbus online survey

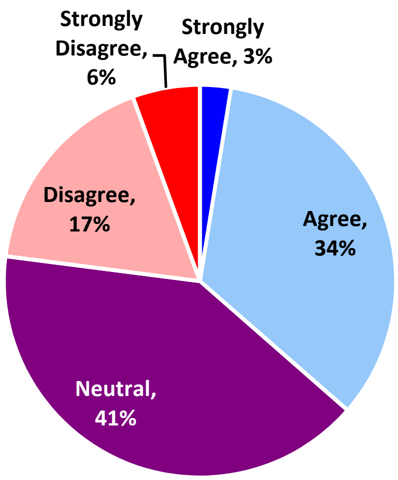
Attracting and retaining talent

Attracting and retaining talent is an important issue for the specialized fields that are a part of the creative economy. The Creative Columbus online survey included these topics related to the creative workforce:

- Whether Central Ohio is attracting and retaining creative talent,
- Why creative professionals have moved to Central Ohio,
- Relative importance of various factors in attracting young talent,
- Apparent skills gaps in the incoming workforce, and
- Areas for educational improvement.

Among 431 respondents, 37% agreed and 23% disagreed that: *Central Ohio is attracting and retaining talented people in my field* (Chart 4-2).

Chart 4-2. Central Ohio is attracting and retaining talented people in my field
(n=431 business and organization, self-employed, and employee respondents)

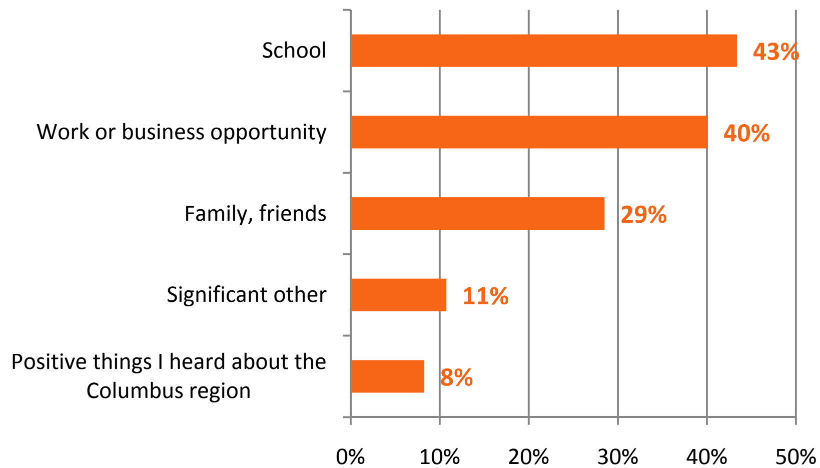


Source: CRP, Creative Columbus online survey

Why employees moved to Central Ohio

Employees who indicated that they previously lived outside of Central Ohio (242 responses) were asked about their reasons for moving here. The responses indicated that moves into the region were overwhelmingly career-driven, with 43% having originally arrived for school and 40% for work. Personal reasons such as family and friends (29%) and significant other (11%) received fewer responses. Only 8% indicated that they moved to Central Ohio on the basis of hearing positive things about the area (Chart 4-3).

Chart 4-3. Reasons for moving to Central Ohio (n=242 employee respondents) (1)



Source: CRP, Creative Columbus online survey

(1) Resondents could select more than one reason

Top factors for attracting and retaining talented people

When asked about the top factors for attraction and retention, all respondent groups (39 businesses, 131 self-employed, 268 employees) agreed on the top two factors—employment opportunities and presence of a creative community—as well as the bottom two factors—creative freedom and business start-up opportunities (Table 4-5).

Table 4-5. Most important factors in attracting and retaining talent (n=438)

Factor	Businesses & Organizations		Self-Employed		Employees	
	Rank	%	Rank	%	Rank	%
Employment opportunities	1	24%	1	21%	1	26%
Creative community	2	21%	2	20%	2	18%
Perception of Columbus and Central Ohio	3	19%	3	15%	5	13%
Quality of life	4	16%	5	11%	4	14%
Cost of living	5	8%	4	14%	3	16%
Creative freedom	6	7%	6	10%	6	6%
Business/start-up opportunities	7	5%	7	8%	7	5%

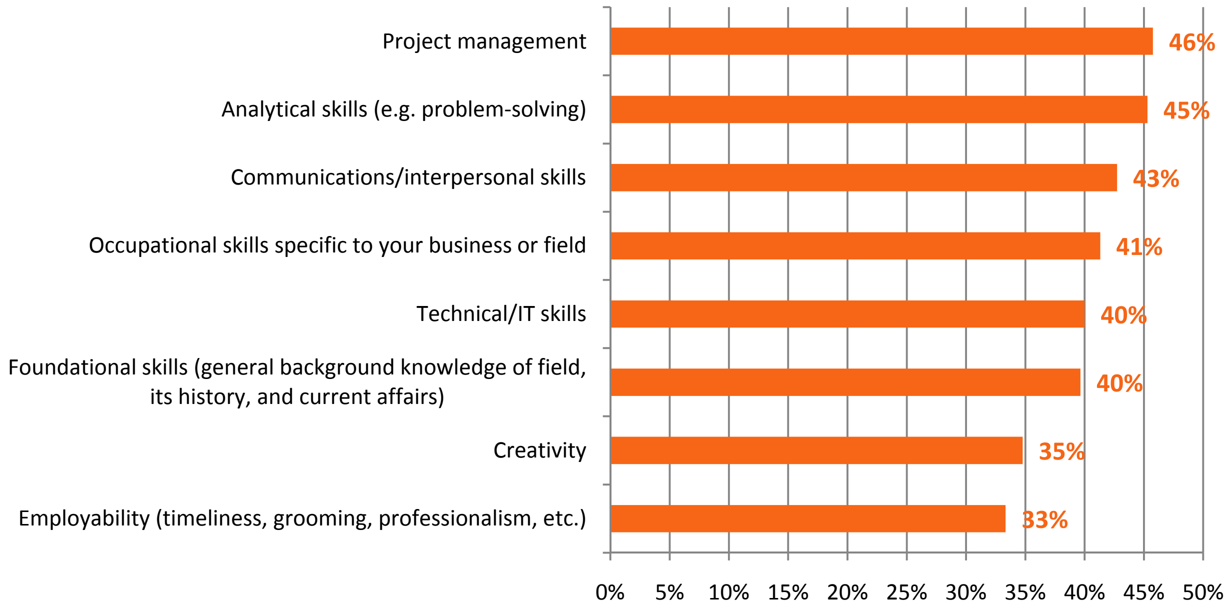
Source: CRP, Creative Columbus online survey

Creative talent skill gaps

Business and organization and self-employed survey respondents were asked about the top skill gaps they encountered in recruitment and contracting for creative talent. Respondents in both groups identified lack of general job skills, such as project management, problem solving, and communications, as the greatest skill gaps.

Occupation-specific skill gaps were selected by over 40% of respondents. Although the skill gaps selected by the smallest percentage were employability and creativity, these were identified as deficiencies by about 1 in 3 respondents (Chart 4-4).

Chart 4-4. Skill gaps in recruitment and contracting (n=115 to 121 responses from business and organizations and self-employed)



Source: CRP, Creative Columbus online survey; respondents could select multiple responses

Educating the future creative workforce

Businesses and organizations, self-employed individuals, and students varied in their opinions about how higher education can be improved:

- Making education more affordable was selected by nearly 2 of 3 students, versus 32% of businesses and organizations, and 43% of self-employed individuals.
- Businesses and organizations and self-employed individuals most frequently selected “better simulation of the work environment” at 74% and 60% respectively, compared to only 35% of students.
- Over one-third of self-employed individuals (35%) selected the need for more classes at non-traditional times and locations. Self-employed individuals as a group seemed to comprise a hybrid of the business and student perspectives: more like businesses in their concern about the talent pool (e.g. hiring a contractor) and more like students in reflecting upon their own education.

All three groups emphasized the need for more student employment opportunities, which was ranked #2 by all respondent groups (Table 4-6).

Table 4-6. Top ways that higher education can be improved (n=282 students; 38 businesses and organizations, 116 self-employed)

Areas where higher education can be improved	Students		Businesses & Organizations		Self-Employed	
	Rank	%	Rank	%	Rank	%
Make education and training more affordable	1	61%	6	32%	3	43%
Offer more student employment opportunities (coops, internships, etc)	2	52%	2	68%	2	50%
Offer greater guidance with choosing careers (career exploration, assessments of skills and interests, counseling, etc)	3	42%	4	39%	6	39%
Offer programs, classes, studios, labs that better simulate the work environment	4	35%	1	74%	1	60%
Change/update curriculum	5	29%	5	37%	3	43%
Have greater employer presence at the school (events, speakers, sponsored competitions)	6	25%	3	45%	5	42%
Offer more classes at non-traditional times and locations (e.g. evening/weekend)	7	23%	7	11%	7	35%
Other	8	12%	8	0%	8	4%

Source: CRP, Creative Columbus online survey; respondents were allowed to select multiple responses

5. Strengths and Weaknesses

Created on Many Eyes (http://many-eyes.com) © IBM

5. Strengths and Weaknesses

Preview

Strengths and weaknesses as mirror images | 5-3

- The topic that generated the most in-depth discussion by Phase 1 focus group and interview participants was the strengths and weaknesses of Central Ohio's creative economy. A theme that emerged from these discussions was that every strength of Central Ohio had a related weakness.

Columbus the college town | 5-4

- Columbus's status as a college town feeds both talent and youthful energy into the creative scene.
- Only 18% of student survey respondents agreed with the statement "I intend to stay in Central Ohio after I graduate," and 35% disagreed. The top reasons cited for leaving were better work and business opportunities and more creative freedom elsewhere.
- Students who were originally from Central Ohio were more likely to want to stay after they graduate, with the primary reason being the proximity to family and friends.

Accessibility: a blessing or a curse? | 5-7

- The region's accessibility was highlighted as a strength, though interviewees felt that the language used to describe this quality needed to be reframed. Affordability, for example, "should be more about value," not just a cheap place to live and conduct business.

Once upon a time…telling the Columbus story | 5-8

- Interview and focus group participants noted that the story about Columbus is not "out there." Nationally, people don't know about Columbus's assets as a creative place.
- Cost of living and quality of life were selected by survey respondents as factors that were likely to attract people to Central Ohio.

Growing the creative scene | 5-9

- Interviewees believed that the region's creative scene has grown significantly in recent years, but they noted the need for a broader base of financial support from foundations to individual consumers.
- Respondents across all four survey groups reported being heavily involved in the creative community on a voluntary or pro bono basis.

Strengths and weaknesses as mirror images

Early in this project, advisory committee members identified key figures in the Central Ohio creative community to contact for their insights and suggestions. The interviews and focus groups covered subjects such as the definition of "creative economy" and survey design and outreach. However, by the far the most popular topic among interview and focus group participants was the strengths and weaknesses of Central Ohio's creative economy.

The main themes that emerged from these discussions were often mirror images; every strength had a related weakness:

- Columbus is a great college town… but the graduates leave
- Columbus is accessible… but that also seems to make it less cool
- Columbus has a great story to tell… but the one that's told is not so great
- Columbus's creative scene has grown… but it needs to be better supported

The discussions went beyond the normal talking points and questioned some of the assumptions behind issues such as attracting and retaining young professionals and the marketing of Columbus. For example: *Central Ohio has over 130,000 people in college and graduate school. Would we really want all of them to stay after graduation?* Or: *If the New York Times writes a glowing article about Columbus in its travel section, how much weight should be placed on this kind of outside validation?*

Photo by Bryan Fenstermacher

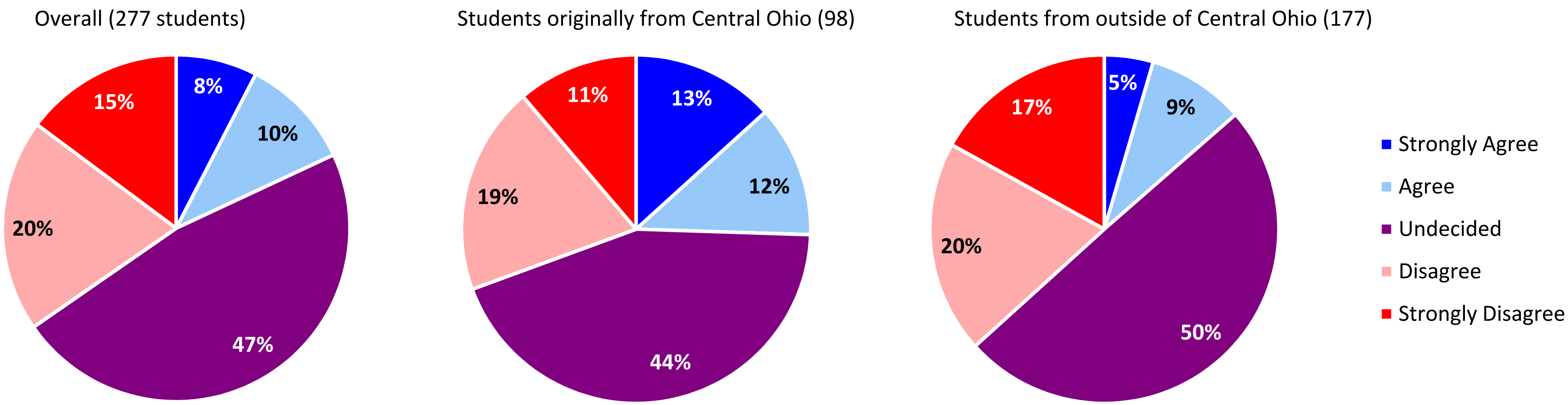
Columbus the college town

We have a lot of really good feeder systems in the way of our colleges and companies that would seemingly provide a good supply of creative people.

Participants in focus groups and interviews noted that an important strength of Columbus is that it is a great college town, with several major universities throughout Central Ohio that draw many students from outside the region. Nearly two-thirds (65%) of the student survey respondents were from outside Central Ohio. This influx contributes to a high "number of creative students that we teach and put out into the marketplace."

Besides their skills, the student population also contributes the energy of youth into the city, as both producers and consumers of arts and entertainment, and more generally with their "openness and inquisitiveness."

Chart 5-1. Responses to the survey question "I intend to stay in Central Ohio after I graduate"



Source: CRP, Creative Columbus online survey

Several participants in the interviews and focus groups noted a "need to keep the CCAD and OSU talent":

> *You have the ability to harness that [presence of students] or let them run out of town like they usually do. Can we create a viable community here for them? This resource has been flooding in and out of town for many years.*

However, some participants questioned the notions behind retention. They believed that many young talented people want to try different experiences or take a shot at a larger city such as New York or Chicago. Interviewees with this perspective saw Columbus as a place that people want to return to: "It's older people who move and then come back to us."

The survey data (Tables 5-1 and 5-2) appear to support these anecdotal insights. Those who want to leave Central Ohio are driven by the search for better economic opportunity, while friends, family, and community are strong reasons for those who want to stay.

Students' views on staying in or leaving Columbus

In the online survey, 277 students answered the question about whether they would stay or leave after graduation (Chart 5-1). Nearly half (47%) were undecided. Twice as many students said they disagree or strongly disagree that they intend to stay than agree or strongly agree (35% versus 18%). This contrasts with the responses of the other survey groups (business and organizations, self-employed, employees) on whether Central Ohio is attracting and retaining talent in their field—37% agreed and 23% disagreed (page 4-8).

The responses varied based on where students were originally from. Students from Central Ohio were more likely to agree or strongly agree about staying (25%) than those from outside the region (14%). This pattern corresponds with the reasons for staying in the region: over half (57%) who intend to stay strongly agreed with the reason "friends and family in the area". Other popular reasons for staying were the presence of the creative community and the region's good quality of life.

Table 5-1. Reasons for staying in Central Ohio (n=46 to 48 student responses)

I intend to stay in Central Ohio because:	Strongly Agree	Agree	Total Agree
Of friends and family in the area	57%	26%	83%
Of the creative community here	26%	55%	81%
Of the good quality of life	26%	51%	77%
There are employment opportunities here	21%	40%	62%
Of the low cost of living	19%	40%	58%
There is more creative freedom here	17%	30%	47%
There are business opportunities here	13%	46%	59%
Of the positive perception of Columbus and Central Ohio	11%	40%	51%

Source: CRP, Creative Columbus online survey

Among respondents who intend to leave, the perception that better employment and business opportunities existed elsewhere were the top two reasons given, followed by "more creative freedom elsewhere." In contrast to the standard discussion about Central Ohio's image, "the negative perception of Columbus/Central Ohio" was only selected by a quarter of students (24%) as a reason to leave, and only 30% agreed with the statement that Central Ohio's creative community was weak.

Table 5-2. Reasons for leaving Central Ohio (89 to 91 student responses)

I intend to leave Central Ohio because:	Strongly Agree	Agree	Total Agree
There are better employment opportunities elsewhere	52%	36%	88%
There are better business opportunities elsewhere	40%	33%	73%
There is more creative freedom elsewhere	26%	44%	70%
I want to be closer to friends and family who live elsewhere	19%	14%	33%
Of its weak creative community	7%	24%	30%
Of the negative perception of Columbus/Central Ohio	7%	17%	24%
Of the poor quality of life	7%	15%	21%
Of the high cost of living	4%	3%	8%

Source: CRP, Creative Columbus online survey

Carlyles Watch, photo by Jody Dzuranin

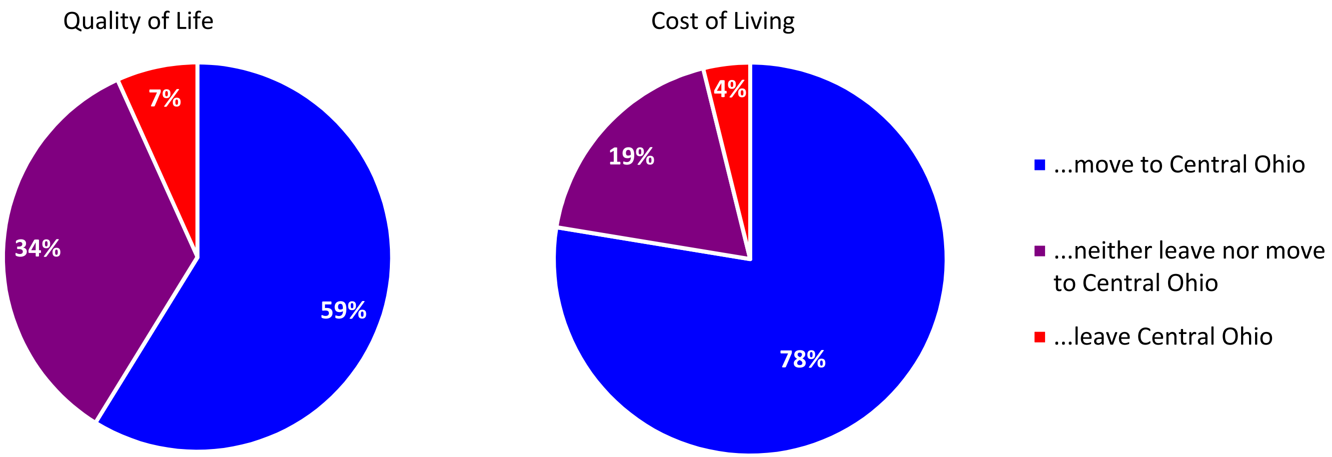
Accessibility: a blessing or a curse?

> *People always sell me on the city as "it's cheap." It's a bad mental model for attracting risk-takers. It should be more about value.*

Many interview and focus group participants noted that Columbus is affordable, convenient, and open. One can "more easily achieve a self-sustaining lifestyle" in Columbus compared to other cities. The "proximity of neighborhoods and nodes of creativity, suppliers, and participation" helps creative businesses and workers. The city provides for a "wide range of experiences." These comments were supported by the survey results. Quality of life and cost of living were the two most frequently selected choices as factors that attract creative people to Central Ohio (Chart 5-2).

However, several interviewees and focus group participants noted that the language of accessibility needs to be reframed. The way some of the positive qualities of Columbus are discussed at times "creates [a negative] perception and perpetuates it." Affordability, for example, "should be more about value," not just a cheap place to live and conduct business. One interviewee criticized the use of qualifiers such

Chart 5-2. "Due to the weakness or strength of the following factors in Central Ohio, talented people in my field are more likely to..."
(415 responses from business, organizations, self-employed, and employees)



Source: CRP, Creative Columbus online survey

as “we have a pretty good theatre for a market this size or a market like this.”

The language of qualifiers reflects a broader desire for validation from outside Central Ohio. Some participants felt that this affected the nurturing of local businesses and talent. There’s a “credibility factor—you have to make it outside Columbus in order to make it here.” Views on this issue ranged from the defiant—“we don’t need New Yorkers to tell us what’s good”—to the balanced—“to be totally provincial would be a mistake. However, there’s a reluctance to look inside and see what’s here.”

Once upon a time…telling the Columbus story

> *When people from both coasts come to visit—and they dread doing so—they’re always surprised by how the city really lives up to everything we tell them about it.*

What words are used to describe Columbus? “Cowtown,” “OSU football,” or maybe “middle-America good place to live?” If a Columbus story is out there, interview and focus group participants felt that it too often follows a stereotype of the Midwest. They discussed the need to tell the real story:

> *The story about Columbus isn’t out there. Nationally, people don’t know about Columbus’s assets as a creative place.*

One result is a surprise or discovery factor when people visit or move to Columbus. A participant described Columbus as a “robust city. People from Chicago or New York are hard to draw here, but once here, they often do not want to leave even if the job goes away.”

Some participants commented on how that story might be told. A formal approach could involve describing “the way of life [in Central Ohio] in a recruiting package in a convenient and attractive way.” But another comment suggested an approach more akin to trends in social media and viral marketing: “Once one comes here and sees it, others follow and ‘discover’ it. Then it begs the question, ‘Why did we lose three people to Columbus?’” Several participants wondered how cities like Austin and Portland formulated and told their stories and what lessons could be applied in Columbus.

Growing the creative scene

> *Corporate folks, CEOs will now speak matter-of-factly about the creative class being an economic engine, like they've known it all along.*

Challenges of continuing to grow the creative economy

Interview and focus group participants felt that the topic of the creative economy seemed to be on the tip of everyone's tongue. The existence of this project and other similar arts and cultural initiatives supports this notion. Central Ohio's creative scene has come a long way. As one participant stated, "Columbus has become a lot more progressive over the past decade and this has benefited the creative economy." "Fifteen years ago there wasn't access to arts like the Wexner." There is "genuine commitment" to the creative economy, including "people running local arts organizations, the wealth of intelligence and creativity among corporate and cultural leaders, and the network of colleges."

Despite the progress, the creative community in Central Ohio still has room for improvement. A number of comments focused on the foundation and patron side of the economy. "Patron-based arts are relatively small in comparison to level of ambition of community." This may reflect Columbus's relative youth compared to other cities like Cleveland or Indianapolis, which have deeper histories of such patronage and resources like the Gund Foundation or the Lilly Foundation.

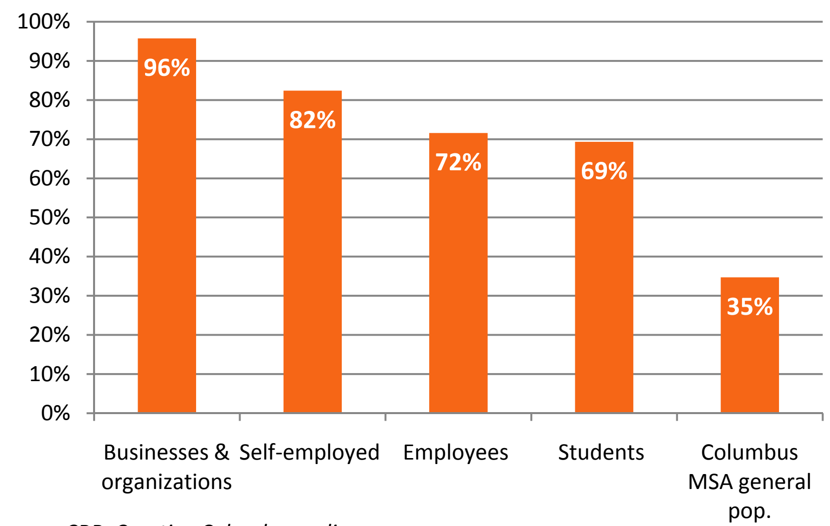
Another outcome of this difference is that in Central Ohio, "there is tremendous overlap in the board members and donors among the top 15 arts organizations." This "leads to fatigue among [the] usual donors."

In the survey, "financing-grants" was the 5th most frequent selection out of 20 for areas where improvement would most help Central Ohio's economy.

A high level of civic involvement

In contrast to concerns about higher-level donors and patrons, the survey revealed significant involvement among respondents in civic and volunteer activities related to Central Ohio's creative scene. To some extent, this is a result of self-selection: the people who would dedicate time to respond to this kind of survey are more likely to dedicate time to volunteering.

Chart 5-3. Percent of respondents who made voluntary or pro bono contributions to the local creative scene in the past year (n=744 total)



Source: CRP, Creative Columbus online survey

However, the difference in level of involvement between the survey groups and the general population are notable nevertheless. Whereas the Corporation for National and Community Service reported that 35% of the Columbus metro area population volunteered (2005-2007 average), 82% of self-employed individuals, 72% of employees, and 69% of students who responded to the survey indicated a contribution of services, supplies, and time to the creative community. The rate among business and organization respondents was 96% (Chart 5-3)

The survey results also countered some of the notions of generational differences raised by focus groups and interviewees, such as "Columbus is lacking the young professionals clamoring to be involved with boards, philanthropy of local institutions." In the employee survey, where respondents had a 72% civic participation rate, the average age was 37. The student rate was almost as high. The employee survey data, when broken down by age, showed some variation: 20-somethings had a 65% rate, compared to 76% for those 30 and over.

Providing creative services and being involved in events were the most common forms of contribution identified across the four survey groups (Table 5-3). Businesses and organizations were more likely to have provided venue space (31%) or supplies (18%), a reflection of their scale. Businesses and organizations and employees were more involved in boards (40% and 34% respectively) and professional associations (56% and 52%) than were self-employed individuals and students.

Table 5-3. Type of volunteer or pro bono contribution (n=555)

Type of voluntary or pro bono contribution	Businesses & organizations	Self-employed	Employees	Students
Provided creative services	64%	79%	69%	57%
Produced creative products	36%	40%	25%	31%
Provided supplies for a creative product or service	18%	11%	13%	8%
Provided space (venue, exhibit)	31%	6%	7%	2%
Served on boards	40%	21%	34%	5%
Involved in professional associations, unions, collaboratives	56%	24%	52%	22%
Involved in events	64%	65%	79%	73%

Source: CRP, Creative Columbus online survey

6. Advancing Our Creative Economy

Mobilize event hosted by Coexist at Chop Chop Gallery, photo by Christian Deuber

6. Advancing Our Creative Economy

Preview

The creative community suggests… | 6-3

- For improvements that can most help Central Ohio's creative economy, "shared costs of health, retirement, and other benefits" ranked #3 out of 20 based on survey responses, following the attraction and retention of young professionals and the quality of the workforce.
- When asked for final comments, many survey respondents made additional suggestions on improving the creative economy. At the top of the list was an online resource for the creative community to network and connect the supply with demand for creative services.

Final thoughts | 6-6

- Besides this report, the Creative Columbus project has yielded several byproducts that can be used for future endeavors, including a directory of creative services, continued outreach to the creative community, and data for related civic initiatives.

The creative community suggests...

The surveys for businesses and organizations, self-employed individuals, and employees asked respondents to identify areas where improvement would most help Central Ohio's creative economy. Of the 20 choices provided (see Table 6-1), the top five responses were:

1. Marketing to attract young professionals or creative talent
2. Labor quality and skills, which can be improved through either attraction of talent or enhancements in education
3. Shared costs of health, retirement, and other benefits.
4. Business marketing (business attraction)
5. Grant financing

Attracting talent (#1) and businesses (#4), the overall pool of talent (#2), and support for arts and culture (#5) have been major parts of the civic discussion for this project and other initiatives, such as Columbus 2012. The surprise among the top choices above may be the "shared costs of health, retirement, and other benefits," which had an average of rankings of #3 across all groups and ranked #2 among the self-employed and employee groups. The rising costs of health care and other benefits is a concern among businesses, organizations, and employees everywhere, and the Central Ohio creative economy is no exception.

In addition to the choices provided on the survey tools, the most common "write-in" responses for areas of improvement that would most help the creative economy were:

- Public transportation
- Support for small businesses and entrepreneurs
- Greater availability of small-scale studio and rehearsal spaces

Table 6-1. Ranking of responses to survey question: "Select the top 3 areas where improvement would help Central Ohio's creative economy most."

Rank Average	Area of improvement	Businesses & Organizations (n=38)	Self-Employed (n=129)	Employees (n=260)
1	Image and marketing - Marketing to attract young professional or creative talent	2	1	1
2	Labor - Quality: talent/skills	1	3	3
3	Professional/business networks - Shared costs of health, retirement and other benefits	4	2	2
4	Image and marketing - Business marketing (business attraction)	3	5	4
5	Financing - Grants	5	4	6
6	Professional/business networks - Professional associations	8	7	8
T-7	Financing - Venture capital	5	9	10
T-7	Real estate - More venues (performance, exhibition)	11	6	7
9	Real estate - Large raw space	8	8	10
10	Labor - Quantity	11	11	5
T-11	Professional/business networks - Buy local first campaign	7	9	12
T-11	Image and marketing - Word-of-mouth campaign	8	11	9
T-13	Business support services - Financial/accounting	13	13	14
T-13	Image and marketing - Tourism marketing	13	14	13
15	Business support services - Intellectual property (i.e. help in obtaining patents, copyrights)	13	14	15
16	Financing - Microcredit	16	16	16
17	Real estate - Hotdesking/hotelling	16	19	18
18	Real estate - Serviced office	18	17	19
19	Business support services - Legal	18	17	20
20	Business support services - HR/admin	20	20	17

Source: CRP, Creative Columbus online survey

Top up-and-coming locations in Central Ohio

Three of the survey groups (self-employed individuals, employees, and students) were asked to select the neighborhood or area of Central Ohio that they thought was the top up-and-coming location for creative businesses and organizations. Many of the most frequently chosen locations coincided with areas where the creative economy already had a presence, as shown by the location quotient and survey data in Section 3.

Table 6-2. Top 10 up-and-coming locations in Central Ohio for creative businesses and organizations
(n=816 self-employed individuals, employees, and students)

1.	Downtown Columbus
2.	Short North area (including Harrison West, Italian Village, Victorian Village)
3.	Clintonville
4.	Grandview Heights/Marble Cliff
5.	Delaware County
6.	Olde Towne East
7.	OSU area (University District, Weinland Park)
8.	Easton
9.	King-Lincoln
10.	Polaris

Source: CRP, Creative Columbus online survey

The Near East Side neighborhoods of Olde Towne East and King-Lincoln may be the exceptions though, not yet identified as creative economy hubs in the data, but considered by the survey respondents as areas with potential.

Additional comments

For the last question of the survey, businesses and organizations were asked to provide additional comments. The other three groups were asked to make up their own question and answer it. With the latter format, there were several silly questions and answers, as one might anticipate. Among the serious responses, most concerned aspects of Columbus and Central Ohio that could be improved—not just the creative economy or community, but also the region in general. The following were the common themes among these comments:

1. The most frequent suggestion was an **online resource** for the creative community. Details varied based on the respondent's field of work, but generally they described a web site that helps businesses and people to:
    - Network
    - Find opportunities: jobs, contracts, auditions
    - Promote themselves: directory ("yellow pages"), upload portfolios or other sample work.
    - Find services
2. A number of respondents felt that the region's image concerns were really a **self-esteem problem**.

3. Comments on the quality of the creative scene varied, but whether one considered the offerings to be excellent or limited, respondents felt that too much of the creative work was “safe.” They saw a need for **more risk-taking** and **support for risk-takers**.
4. Respondents expressed worries about **the state of the economy** overall and its impact on the arts and creative businesses. One person wrote, “With the economy the way it is, the first thing they cut is the arts programs.” On the business side, someone wrote, “low economy, low advertising needs.”
5. Finally, some respondents noted **crime and safety** issues in downtown Columbus, though these comments were more about the perception of danger than actual occurrences.

Final thoughts

Although this report represents the final deliverable of a commissioned project, there are several byproducts that can be used or maintained for future endeavors.

Central Ohio Creative Services Directory

For organizations, businesses, and self-employed individuals, the survey contained an option for the respondent to provide detailed information about their services. This information can be packaged into a creative services directory, serving the dual function of promoting Central Ohio’s creative scene and providing information to those seeking services.

Continued dialogue on Facebook and MySpace

The Facebook and MySpace pages for this project have a combined 500+ fans and friends. These pages can be maintained as a forum for further dialogue and outreach.

Data

The secondary and survey data gathered for this report can be further mined to answer questions raised in other civic efforts, such as Columbus 2012 or the Greater Columbus Arts Council’s cultural planning.

APPENDICES

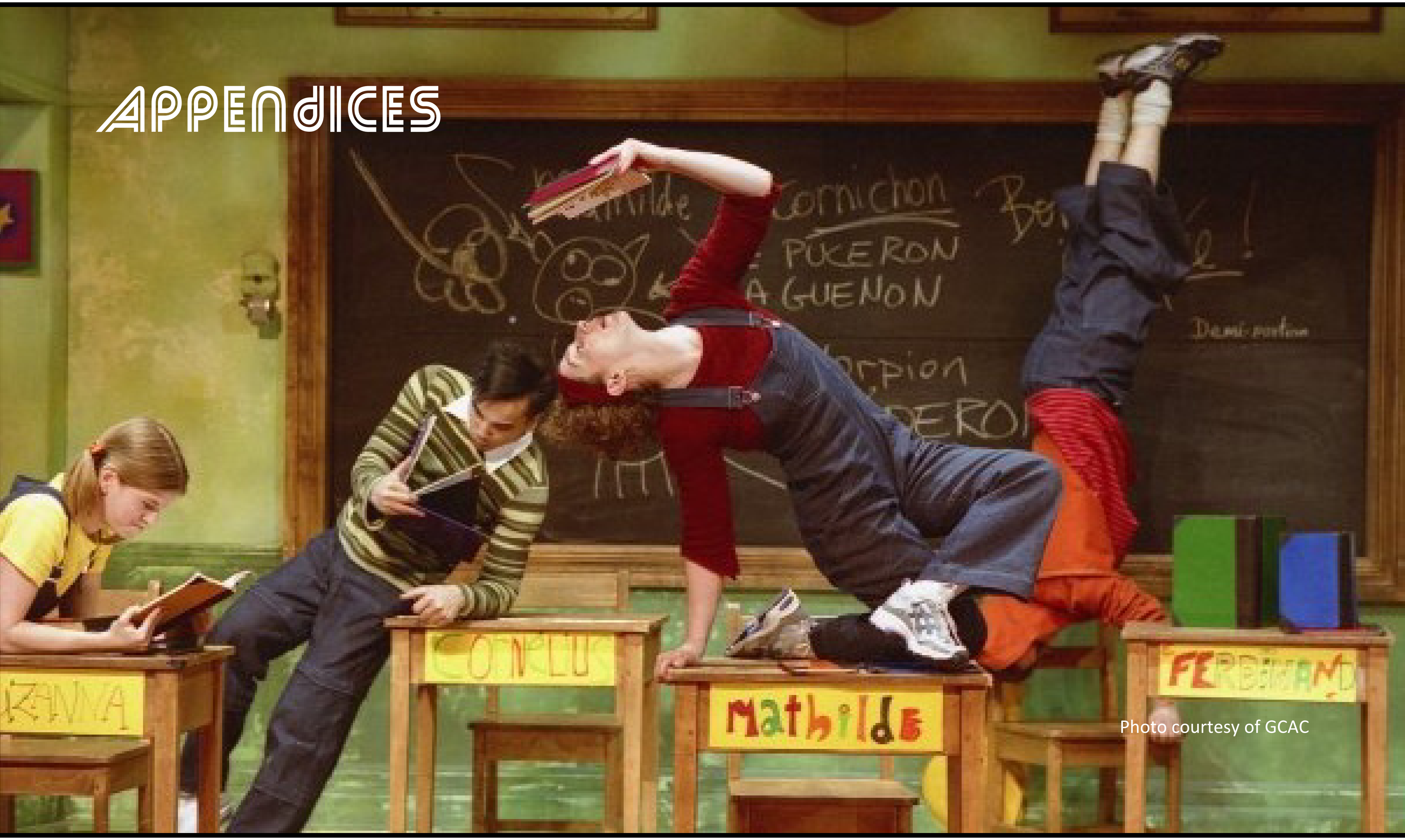


Photo courtesy of GCAC

Appendices

Appendix A: Interviews, focus groups, other conversations, and outreach assistance

Phase I interviews Jaimie Alexander, Frame360 | Jon Barnes, Jonathan Barnes Architecture & Design | Bev Bethge, Ologie | Brandon Dupler, Dupler Office | Walker Evans, Columbus Underground | Bill Faust, Ologie | Sherri Geldin, Wexner Center for the Arts | Kyle Katz, The Buggyworks | Bryan Knicely, Greater Columbus Arts Council | Elizabeth Lessner, Betty's Food & Spirits | Scott Razek, The Limited | Rich Rosen and Adrienne Selsor, Battelle| Jeff Scheiman, SOS Video Communications | **Phase I focus groups** Rod Bouc, Columbus Museum of Art | Alan Moser, Frame360 | Jon Myers, Texture Media Group | Kelly Stevelt-Kaser, OSU Urban Arts Space | Tim Straker, Ologie | Mike Bills, Fitch | Bob Breithaupt, Jazz Arts Group | Dan Gray, OSU, lighting designer | David Guion, Dublin Arts Council | Elizabeth Jewell, Worthington Arts Council | Terry Rohrbach, Base Art Co. | **Other conversations** Jen Adrion, Couchfire Collective | Matt Barnes | Adam Brouillette, Couchfire Collective | Bela Koe-Krompecher, Anyway Records | Scott Kuenzli, Rivet Gallery | Erin Moore, Columbus Music Co-op | Josh Quinn, Tigertree | Mike Reed | Rebecca Rule, The Concept Spot | Kyle David Widder, KDW Photo | **Outreach assistance** Barbara Beardsley, Columbus Metropolitan Library | Matt Carbone, American Institute of Architects – Columbus chapter | Kay Kaiser, Advertising Federation of Columbus | Mary Wehrle, The Central Ohio Network | **Additional thanks** to everyone who participated in the Creative Columbus online surveys, fans and friends of Creative Columbus on Facebook and MySpace, and the creative community at large for taking interest and being involved

Photos by GCAC (cropped), Christian Deuber, Sami Nummi, Bryan Fenstermacher, Christian Adams, Dublin Arts Council (cropped)

Appendix B: Calculations of direct economic impact

Using methodology from the Columbus Chamber of Commerce, CRP calculated various components of the creative sector's direct economic value. This appendix describes the methodology for each column on Table 3-5.

Receipts

Business receipts for 2006 were estimated using a combination of the U.S. Census Bureau's 2002 Economic Census and the Bureau of Labor Statistics' 2006 Quarterly Census of Employment and Wages. The 2002 data contains both receipts and wages data, while the 2006 data only contains wages. To estimate the 2006 receipts, the ratio between the 2002 receipts to wages was applied. This is a conservative estimate, as it assumes that labor productivity and efficiency levels remained static between 2002 and 2006. If productivity increases were assumed, it would have yielded a higher ratio of receipts to wages and, therefore, higher receipts.

Wages

Wages for 2006 were collected for each creative industry from the Quarterly Census of Employment and Wages. For some industries, the wage data were not available at the detailed industry level, namely 6-digit codes from the North American Industry Classification System (NAICS). In these cases, wage data from the next level up, the 4-digit NAICS codes, were assumed.

State income tax

State income tax revenues were estimated by assuming that all jobs in each industry earn the average wage for that industry, calculating the state tax liability for that wage level[1], and dividing tax liability by wages to obtain an effective income tax rate (the rate that people actually pay). It is assumed that households on average have two exemptions; the average federal return has 1.98 exemptions, according to the Internal Revenue Service's *Statistics of Income*. It is assumed that half of all returns include the joint filing credit. With these assumptions, Ohio income tax liability and the effective average tax rate for each sector are obtained by performing the calculations outlined on the standard Ohio income tax form assuming the average wage for the sector.

State sales tax

State sales tax generated by the jobs depends on the proportion of income spent on taxable purchases. Based on analysis of data from the U.S. Bureau of Labor Statistics' Consumer Expenditure Survey, 80 percent of the average household's income is spent on consumer purchases, and 33 percent of these purchases are taxable. The resulting taxable expenditures are multiplied by the 5.5% state sales tax rate to yield state tax revenue.

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[1] State income tax liability is based on federal adjusted gross income (AGI), which for most households is different from wage income. It would be incorrect to adjust wages for these differences, however, because this would include factors not relevant to employment.

State commercial activity tax

The commercial activity tax rate, a flat rate of 0.26%, was multiplied with the estimated 2006 receipts to calculate this revenue for each industry.

Local income tax

The local income tax rate is a composite rate, estimated by calculating the population-weighted average rate for the counties of the Columbus MSA. The resulting composite rate of 1.73% was multiplied with the total wages.

Local sales tax

As with the state sales tax, assumptions from the derived from the Consumer Expenditure Survey were again used to calculate taxable expenditure. The local sales tax rate is a composite rate, estimated by calculating the population-weighted average rate for the counties of the Columbus MSA. This rate of 1.25% was multiplied with the taxable expenditure.

Total tax revenue

All state and local tax revenues were added together.

Appendix C: Creative sector industries – employer establishments, employment, and location quotients, 2006

Industry			Annual average, Columbus Metro Area							Annual average, U.S.	
Code	Name	Group	Estab.	Employment			Employment location quotient			Estab.	Employment
					Low	High		Low	High		
	All creative sector industries		1,368	18,303	16,932	19,674	0.95	0.88	1.02	288,718	2,882,579
453920	Art Dealers	Visual Arts	26	66			0.43			6,818	23,179
511110	Newspaper Publishers	Media	51	2,104			0.87			9,342	360,491
511120	Periodical Publishers	Media	43	1,778			1.86			8,912	142,885
511130	Book Publishers	Media	19	1,306			2.42			3,869	80,569
511199	All Other Publishers	Media	4	160	101	219	1.55	0.98	2.12	1352	15424
511210	Software Publishers	Media	67	542			0.33			9,852	243,135
512110	Motion Picture and Video Production	Media	42	151			0.12			15,211	190,634
512191	Teleproduction and Postproduction Services	Media	3	50	26	73	0.47	0.25	0.69	1655	15816
512199	Other Motion Picture and Video Industries	Media	1	0			0.00			448	3682
512210	Record Production	Media	0	0			0.00			523	2596
512220	Integrated Record Production/Distribution	Media	1	5	2	8	0.20	0.08	0.32	362	3689
512230	Music Publishers	Media	1	3	1	4	0.09	0.04	0.14	733	4220
512240	Sound Recording Studios	Media	5	19	12	26	0.40	0.25	0.55	1740	7092
512290	Other Sound Recording Industries	Media	0	27	17	36	1.19	0.76	1.61	551	3332
515111	Radio Networks	Media	3	0			0.00			1386	25476
515112	Radio Stations	Media	17	756	484	1,028	1.31	0.84	1.79	4409	86021

Industry			Annual average, Columbus Metro Area							Annual average, U.S.	
Code	Name	Group	Estab.	Employment			Employment location quotient			Estab.	Employment
					Low	High		Low	High		
515120	Television Broadcasting	Media	11	2,219			2.64			2461	125687
516110	Internet Publishing and Broadcasting	Media	15	74			0.32			3,769	34,668
519120	Libraries and Archives	Institutions	6	59			0.31			2,102	28,579
541310	Architectural Services	Built Environment	174	2,210			1.61			25,168	204,574
541320	Landscape Architectural Services	Built Environment	21	86			0.29			7,305	44,796
541410	Interior Design Services	Built Environment	49	202			0.72			13,149	41,938
541420	Industrial Design Services	Product Design	14	150	95	205	1.74	1.10	2.38	2,306	12,879
541430	Graphic Design Services	Visual Arts	103	459			0.97			17,215	70,922
541490	Other Specialized Design Services	Product Design	4	52	29	74	0.61	0.34	0.88	2,382	12,612
541613	Marketing Consulting Services	Marketing	113	414			0.48			26,889	129,364
541810	Advertising Agencies	Marketing	112	1,163			0.98			18,436	178,035
541820	Public Relations Agencies	Marketing	67	425	252	598	1.33	0.79	1.87	8,454	47,714
541830	Media Buying Agencies	Marketing	9	65			1.03			1,034	9,431
541840	Media Representatives	Marketing	18	44	26	61	0.20	0.12	0.28	3,607	32,229
541850	Display Advertising	Marketing	19	252			1.07			3,301	35,191
541860	Direct Mail Advertising	Marketing	26	501			1.09			3,222	68,653
541870	Advertising Material Distribution Services	Marketing	14	243			2.11			1,443	17,191
541890	Other Services Related to Advertising	Marketing	29	166			0.37			8,818	67,045
541910	Marketing Research and Public Opinion Polling	Marketing	31	336	197	475	0.46	0.27	0.65	7,470	109,985
541921	Photography Studios, Portrait	Visual Arts	93	494			0.99			14,340	74,872
541922	Commercial Photography	Visual Arts	16	44			0.59			3,802	11,062
611610	Fine Arts Schools	Institutions	53	417	258	576	0.99	0.61	1.36	9,685	63,114

Industry			Annual average, Columbus Metro Area							Annual average, U.S.	
Code	Name	Group	Estab.	Employment			Employment location quotient			Estab.	Employment
					Low	High		Low	High		
711110	Theater Companies and Dinner Theaters	Performing Arts	9	93			0.23			3,199	61,238
711120	Dance Companies	Performing Arts	1	180	102	257	3.10	1.76	4.43	568	8,662
711130	Musical Groups and Artists	Performing Arts	16	189			0.72			5,326	39,414
711190	Other Performing Arts Companies	Performing Arts	2	8	3	12	0.21	0.09	0.34	548	5,263
711510	Independent Artists, Writers, and Performers	Performing Arts	42	165	85	244	0.52	0.27	0.77	20,827	47,377
712110	Museums	Institutions	11	403	230	575	0.83	0.48	1.19	3,567	72,153
712120	Historical Sites	Institutions	5	206	119	293	2.35	1.36	3.34	558	13,126
712190	Nature Parks and Other Similar Institutions	Institutions	2	22	13	30	0.49	0.30	0.68	604	6,564

Sources: U.S. Bureau of Labor, Quarterly Census of Employment and Wages; U.S. Census Bureau, County Business Patterns

Notes: For industries with metro employment data unavailable in QCEW, employment was estimated by employer counts within employer size ranges from CBP. For these industries, the low and high estimates are presented, as well as the mid-point estimate used in analysis.

Appendix D: Creative sector employer establishments by industry, size, and county, 2006

Delaware County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
	All creative sector industries	139	94	17	12	7	3	3	2	1	0
453920	Art Dealers	2	2								
511110	Newspaper Publishers	3	1			1	1				
511120	Periodical Publishers	2	1	1							
511130	Book Publishers	5		1		1	1	1		1	
511199	All Other Publishers	1	1								
511210	Software Publishers	10	6		1	1	1		1		
512110	Motion Picture and Video Production	2	1	1							
512191	Teleproduction and Postproduction Services	1	1								
515112	Radio Stations	2	1		1						
541310	Architectural Services	9	7	2							
541410	Interior Design Services	6	5	1							
541430	Graphic Design Services	13	9	2	2						
541490	Other Specialized Design Services	1	1								
541613	Marketing Consulting Services	24	20	3		1					
541810	Advertising Agencies	8	5			2			1		
541830	Media Buying Agencies	4	3		1						
541840	Media Representatives	1		1							
541850	Display Advertising	5	5								

Delaware County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
541860	Direct Mail Advertising	1	1								
541870	Advertising Material Distribution Services	1						1			
541890	Other Services Related to Advertising	6	6								
541910	Marketing Research and Public Opinion Polling	1		1							
541921	Photography Studios, Portrait	11	4	1	5	1					
541922	Commercial Photography	1	1								
611610	Fine Arts Schools	10	7	1	2						
711130	Musical Groups and Artists	2	1	1							
711190	Other Performing Arts Companies	1	1								
711510	Independent Artists, Writers, and Performers	3	3								
712120	Historical Sites	1						1			
712190	Nature Parks and Other Similar Institutions	2	1	1							

Source: U.S. Census Bureau, County Business Patterns

Fairfield County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
	All creative sector industries	51	33	11	5	1	1	0	0	0	0
511110	Newspaper Publishers	2		1		1					
511120	Periodical Publishers	2	1		1						
511199	All Other Publishers	2			1		1				
511210	Software Publishers	1	1								
512110	Motion Picture and Video Production	2	2								
515112	Radio Stations	1	1								
519120	Libraries and Archives	1			1						
541310	Architectural Services	3	2	1							
541410	Interior Design Services	3	2	1							
541430	Graphic Design Services	4	3		1						
541613	Marketing Consulting Services	4	4								
541810	Advertising Agencies	1	1								
541820	Public Relations Agencies	1	1								
541850	Display Advertising	1		1							
541860	Direct Mail Advertising	2	2								
541870	Advertising Material Distribution Services	2	2								
541890	Other Services Related to Advertising	1	1								
541921	Photography Studios, Portrait	6	4	2							
611610	Fine Arts Schools	5	1	3	1						
711130	Musical Groups and Artists	1	1								

Fairfield County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
711510	Independent Artists, Writers, and Performers	4	3	1							
712120	Historical Sites	1		1							
712190	Nature Parks and Other Similar Institutions	1	1								

Source: U.S. Census Bureau, County Business Patterns

Franklin County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
	All creative sector industries	1,024	630	160	105	79	23	20	4	1	2
453920	Art Dealers	22	18	3	1						
511110	Newspaper Publishers	17	6	3	2	3		1	1	1	
511120	Periodical Publishers	24	11	7	3	2	1				
511130	Book Publishers	19	4	5	4	1	2	1	1		1
511199	All Other Publishers	8	5	1	1	1					
511210	Software Publishers	50	21	9	5	7	4	3	1		
512110	Motion Picture and Video Production	34	25	2	3	3		1			
512191	Teleproduction and Postproduction Services	6	5			1					
512220	Integrated Record Production/Distribution	2	2								
512230	Music Publishers	1	1								

Franklin County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
512240	Sound Recording Studios	3	1	2							
512290	Other Sound Recording Industries	4	2	1	1						
515112	Radio Stations	22	7	1	3	5	6				
515120	Television Broadcasting	13	5			2	1	4			1
516110	Internet Publishing and Broadcasting	8	6	1	1						
519120	Libraries and Archives	2	1		1						
541310	Architectural Services	141	71	32	16	14	3	4	1		
541320	Landscape Architectural Services	15	7	2	3	2	1				
541410	Interior Design Services	32	25	3	2	2					
541420	Industrial Design Services	9	5	1	1	1	1				
541430	Graphic Design Services	84	59	16	8	1					
541490	Other Specialized Design Services	4	2	1		1					
541613	Marketing Consulting Services	95	74	10	6	4		1			
541810	Advertising Agencies	61	42	9	6	3	1				
541820	Public Relations Agencies	61	41	12	4	3	1				
541830	Media Buying Agencies	6	5			1					
541840	Media Representatives	7	5	1	1						
541850	Display Advertising	14	7	2	4	1					
541860	Direct Mail Advertising	18	8	1	6		2	1			
541870	Advertising Material Distribution Services	5	4		1						
541890	Other Services Related to Advertising	37	23	8	2	4					

Franklin County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
541910	Marketing Research and Public Opinion Polling	24	12	2	3	7					
541921	Photography Studios, Portrait	62	45	11	5	1					
541922	Commercial Photography	12	10	1	1						
611610	Fine Arts Schools	33	18	5	8	2					
711110	Theater Companies and Dinner Theaters	12	5	2		5					
711120	Dance Companies	2	1					1			
711130	Musical Groups and Artists	13	9	1	1	1		1			
711190	Other Performing Arts Companies	1	1								
711510	Independent Artists, Writers, and Performers	29	24	3	1	1					
712110	Museums	7	4	1				2			
712120	Historical Sites	3	2		1						
712190	Nature Parks and Other Similar Institutions	2	1	1							

Source: U.S. Census Bureau, County Business Patterns

Licking County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
	All creative sector industries	69	45	12	8	2	1	1	0	0	0
511110	Newspaper Publishers	4	1	2				1			
511120	Periodical Publishers	3	1	1	1						
511130	Book Publishers	1		1							
511210	Software Publishers	1		1							
512110	Motion Picture and Video Production	2	2								
512240	Sound Recording Studios	1	1								
515112	Radio Stations	2			1	1					
519120	Libraries and Archives	1			1						
541310	Architectural Services	7	4	1	2						
541320	Landscape Architectural Services	2	2								
541410	Interior Design Services	3	2	1							
541430	Graphic Design Services	1	1								
541490	Other Specialized Design Services	1	1								
541613	Marketing Consulting Services	3	2				1				
541810	Advertising Agencies	4	2	1	1						
541840	Media Representatives	1	1								
541850	Display Advertising	1		1							
541870	Advertising Material Distribution Services	1				1					
541890	Other Services Related to Advertising	1		1							
541921	Photography Studios, Portrait	8	7	1							

Licking County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
541922	Commercial Photography	2	2								
611610	Fine Arts Schools	5	4		1						
711110	Theater Companies and Dinner Theaters	1	1								
711120	Dance Companies	1	1								
711190	Other Performing Arts Companies	1	1								
711510	Independent Artists, Writers, and Performers	4	4								
712110	Museums	5	3	1	1						
712120	Historical Sites	2	2								

Source: U.S. Census Bureau, County Business Patterns

Madison County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
	All creative sector industries	11	5	1	3	2	0	0	0	0	0
511110	Newspaper Publishers	2			1	1					
541410	Interior Design Services	2		1	1						
541430	Graphic Design Services	2	1			1					
541890	Other Services Related to Advertising	1	1								
541921	Photography Studios, Portrait	2	1		1						

Madison County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
611610	Fine Arts Schools	1	1								
711510	Independent Artists, Writers, and Performers	1	1								

Source: U.S. Census Bureau, County Business Patterns

Morrow County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
	All creative sector industries	4	3	0	0	1	0	0	0	0	0
511110	Newspaper Publishers	1				1					
541310	Architectural Services	1	1								
541890	Other Services Related to Advertising	1	1								
541921	Photography Studios, Portrait	1	1								

Source: U.S. Census Bureau, County Business Patterns

Pickaway County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
	All creative sector industries	12	8	1	2	1	0	0	0	0	0
511110	Newspaper Publishers	1				1					
511120	Periodical Publishers	3	2	1							
511210	Software Publishers	2	1		1						
541310	Architectural Services	1	1								
541410	Interior Design Services	1	1								
611610	Fine Arts Schools	3	2		1						
712110	Museums	1	1								

Source: U.S. Census Bureau, County Business Patterns

Union County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
	All creative sector industries	21	12	8	0	1	0	0	0	0	0
511110	Newspaper Publishers	3	1	1		1					
541310	Architectural Services	1		1							
541420	Industrial Design Services	1		1							
541430	Graphic Design Services	3	2	1							
541810	Advertising Agencies	4	3	1							

Union County											
Code	**Industry Name**	**Employer establishments**									
		Total	**By average number of employees**								
			1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
541890	Other Services Related to Advertising	1	1								
541921	Photography Studios, Portrait	3	2	1							
611610	Fine Arts Schools	2		2							
711130	Musical Groups and Artists	1	1								
712110	Museums	2	2								

Source: U.S. Census Bureau, County Business Patterns

Appendix E: Creative sector employer establishments by size and zip code area, 2006

Zip code area	Employer establishments									
	Total	By average number of employees								
		1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
43001	1	1								
43004	4	3		1						
43008	1	1								
43011	2	2								
43015	24	16	4	3	1					
43016	31	17	7	6	1					
43017	91	53	18	12	4	1	2	1		
43018	1	1								
43021	5	5								
43023	16	9	4	2		1				
43025	1				1					
43026	37	24	6	5		1	1			
43031	1	1								
43035	19	14	1		1	2	1			
43040	13	8	4		1					
43046	1		1							
43054	22	15	3	2	2					
43055	32	21	4	6			1			
43056	4	2	2							
43058	2	1			1					

Zip code area	Employer establishments									
	Total	By average number of employees								
		1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
43062	6	5	1							
43064	7	4	2	1						
43065	40	31	6	2			1			
43068	20	17	2	1						
43074	5	2	3							
43077	1	1								
43080	1		1							
43081	45	31	7	5		2				
43082	22	16	1	2	2			1		
43083	1	1								
43085	50	32	7	5	4	1	1			
43086	1	1								
43103	2	2								
43105	3	2	1							
43110	11	9	2							
43112	3	1		2						
43113	8	5	1	1	1					
43116	1	1								
43119	3	2	1							
43123	18	14	3		1					
43125	8	3		1	1	3				
43126	1	1								

Zip code area	Employer establishments									
	Total	By average number of employees								
		1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
43130	26	18	5	1	1	1				
43136	1			1						
43140	6	1	1	2	2					
43146	1	1								
43147	14	10	3	1						
43148	1	1								
43150	1	1								
43155	1	1								
43162	2	2								
43164	1			1						
43201	17	10	2	2	3					
43202	15	10		1	1		2			1
43204	22	8	5	2	4	1	2			
43205	5	5								
43206	14	11	3							
43207	8	6	1		1					
43209	24	18	3	2	1					
43210	1			1						
43211	3	2					1			
43212	51	28	10	8	4	1				
43213	9	6	1	2						
43214	22	16	4		2					

Zip code area	Employer establishments									
	Total	By average number of employees								
		1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+
43215	202	109	32	22	24	5	9	1		
43216	1						1			
43219	24	10	6	3	4					1
43220	42	27	4	8	2	1				
43221	44	34	5	3	1			1		
43222	2	1			1					
43223	4	3			1					
43224	7	5	2							
43227	3	2	1							
43228	21	13	5		2				1	
43229	34	14	7	6	3	2	1	1		
43230	42	29	5	4	4					
43231	13	9	1		2	1				
43232	11	6	4			1				
43235	51	35	5	3	6	2				
43236	1	1								
43240	15		2	5	3	2	1	1	1	
43320	1	1								
43338	3	2			1					
43344	1		1							

Source: U.S. Census Bureau, Zip Code Business Patterns

Appendix F: Creative sector employer establishments by industry group and zip code area, 2006

Zip Code Area	Employer establishments							
	Total	By industry group						
		Built Environment	Institutions	Marketing	Media	Performing Arts	Product Design	Visual Arts
43001	1							1
43004	4	1		1				2
43008	1		1					
43011	2	1			1			
43015	24	3	3	7	3	1	1	6
43016	31	2	1	11	6	2	2	7
43017	91	19	4	33	16	4	3	12
43018	1			1				
43021	5	1	1	3				
43023	16		4	4	4	4		
43025	1			1				
43026	37	3	2	12	7	5		8
43031	1							1
43035	19		2	8	4	2		3
43040	13		4	2	2	1	1	3
43046	1	1						
43054	22		2	9	4	2	1	4
43055	32	7	7	1	7	3	1	6

Zip Code Area	Employer establishments							
	Total	By industry group						
		Built Environment	Institutions	Marketing	Media	Performing Arts	Product Design	Visual Arts
43056	4			2				2
43058	2		1		1			
43062	6	2		2	1			1
43064	7	2	1	2				2
43065	40	9	4	13	8	1		5
43068	20	5	1	2	3	2	1	6
43074	5			2	2			1
43077	1			1				
43080	1				1			
43081	45	6	3	16	8	1		11
43082	22		3	14	2			3
43083	1			1				
43085	50	9	3	25	6			7
43086	1				1			
43103	2	1			1			
43105	3					1		2
43110	11	1	2	3	1			4
43112	3	1			2			
43113	8	1	4		3			
43116	1				1			
43119	3			3				

Zip Code Area	Employer establishments							
	Total	By industry group						
		Built Environment	Institutions	Marketing	Media	Performing Arts	Product Design	Visual Arts
43123	18	3	1	5	3	1		5
43125	8	1	1	4	1			1
43126	1		1					
43130	26	2	2	8	5	3		6
43136	1		1					
43140	6	1			2			3
43146	1					1		
43147	14	2	3	4	2	1		2
43148	1			1				
43150	1				1			
43155	1		1					
43162	2					1		1
43164	1				1			
43201	17	2	1	7	1	2		4
43202	15	2		2	9			2
43204	22	3		5	11			3
43205	5			1	2			2
43206	14	3		3	1	2		5
43207	8	1	1	2	1	2		1
43209	24	4	2	8	6			4
43210	1				1			

Zip Code Area	Employer establishments							
	Total	By industry group						
		Built Environment	Institutions	Marketing	Media	Performing Arts	Product Design	Visual Arts
43211	3		1					2
43212	51	15	2	12	11	1		10
43213	9		2	1	2	1		3
43214	22	8	1	5	2			6
43215	202	56	6	64	27	17	1	31
43216	1				1			
43219	24	2	1	10	5	2		4
43220	42	11	1	14	9	2		5
43221	44	9	5	16	6	2	1	5
43222	2			2				
43223	4			1	1			2
43224	7	4			3			
43227	3			1	1	1		
43228	21		1	8	4	2		6
43229	34	2		11	14			7
43230	42	8	2	12	12	2	2	4
43231	13	2		5	2	2	1	1
43232	11	1		1	3	1		5
43235	51	9	1	16	17	2	1	5
43236	1							1
43240	15			2	7			6

Zip Code Area	Employer establishments							
	Total	By industry group						
		Built Environment	Institutions	Marketing	Media	Performing Arts	Product Design	Visual Arts
43320	1							1
43338	3	1		1	1			
43344	1				1			

Source: U.S. Census Bureau, Zip Code Business Patterns

Appendix G: Nonemployer businesses and receipts (in $1,000s), 2006

	Creative Businesses	Art dealers	Architectural services	Landscape architectural services	Specialized design services	Advertising and related services	Marketing research and public opinion polling	Photographic services	Performing arts companies	Independent artists, writers, and performers
Delaware County	744	13	38	32	124	106	10	65	30	326
Fairfield County	367	5	12	10	56	33	5	44	19	183
Franklin County	5,035	61	189	123	856	524	98	421	192	2,571
Licking County	492	4	20	46	68	38	8	47	18	243
Madison County	79				9	4		13	3	50
Morrow County	48			4	7	7		7	4	19
Pickaway County	71		6	3	10			16		36
Union County	94			9	13	10		16		46
Columbus Metro	6,930	83	265	227	1,143	722	121	629	266	3,474
Delaware County	$27,638	$242	$2,384	$1,040	$4,701	$9,057	$555	$1,277	$2,610	$5,772
Fairfield County	$6,848	$155	$478	$316	$2,026	$671	$41	$648	$296	$2,217
Franklin County	$121,175	$2,521	$8,325	$4,098	$30,758	$24,058	$3,067	$9,903	$2,157	$36,288
Licking County	$9,890	$53	$1,054	$1,319	$3,082	$1,035	$148	$525	$159	$2,515
Madison County	$859				$112	$188		$92	$18	$449
Morrow County	$911			$144	$54	$326		$46	$46	$295
Pickaway County	$998		$115	$73	$272			$178		$360
Union County	$1,899			$417	$262	$427		$298		$495
Columbus Metro	$170,218	$2,971	$12,356	$7,407	$41,267	$35,762	$3,811	$12,967	$5,286	$48,391

Source: U.S. Census Bureau, Nonemployer Statistics

Appendix H: Revenues and expenditures of surveyed businesses and organizations, 2007

	Revenue	Salaries	Operating costs	Local suppliers and contractors	Financial support of local arts
Number of responses	***53***	***40***	***41***	***40***	***39***
Less than $25,000	6%	13%	24%	25%	87%
$25,000 - $100,000	13%	20%	37%	30%	3%
$100,000 - $250,000	9%	15%	12%	23%	8%
$250,000 - $500,000	6%	10%	5%	5%	0%
$500,000 - $1 million	11%	13%	7%	3%	0%
$1m - 2.5m	15%	5%	5%	8%	0%
$2.5m - $5m	13%	18%	0%	5%	3%
$5m - $10m	13%	3%	5%	0%	0%
$10m - $50m	8%	3%	5%	3%	0%
$50m - $100m	0%	3%	0%	0%	0%
$100m - $500m	2%	0%	0%	0%	0%
$500m - $1 billion	2%	0%	0%	0%	0%
Over $1 billion	2%	0%	0%	0%	0%

Source: Community Research Partners, Creative Columbus online survey

The median respondent reported the following revenues and expenditures in 2007:

- revenues of $1 million to $2.5 million
- expenditures on salaries of $250,000 to $500,000
- operating costs of $25,000 to $100,000
- local contracts and purchases of $25,000 to $100,000
- financial support of local arts of less than $25,000

Appendix I: Revenues, expenditures, and hours of surveyed self-employed individuals, 2007

	Revenue	Operating costs	Local suppliers and contractors	Financial support of local arts
Number of responses	***154***	***148***	***146***	***139***
Less than $10,000	49%	82%	90%	99%
$10,000 - $19,999	11%	14%	7%	1%
$20,000 - $29,999	5%	3%	1%	0%
$30,000 - $39,999	4%	1%	1%	0%
$40,000 - $49,999	5%	1%	1%	1%
$50,000 - $74,999	10%	0%	0%	0%
$75,000 - $99,999	6%	0%	0%	0%
$100,000 - $149,999	5%	0%	0%	0%
$150,000 - $199,999	3%	0%	0%	0%
$200,000 - $299,999	1%	0%	0%	0%
$300,000 - $399,999	1%	0%	0%	0%
$400,000 - $499,999	0%	0%	0%	0%
$500,000 or greater	0%	0%	0%	0%

Source: Community Research Partners, Creative Columbus online survey

Hours per week	Number of times selected	% of valid responses (n=148)
NA – my creative field is my primary source of income	48	32%
1-5	13	9%
5-10	19	13%
10-15	15	10%
15-20	20	14%
20-30	14	9%
30-40	12	8%
40+	7	5%

Source: Community Research Partners, Creative Columbus online survey

About a third (31%) of the self-employed individuals had annual revenue or income of at least $40,000, while nearly half (49%) were below $10,000. This reflects the predominance of freelancers, as only 32% of respondents identified their creative work as the primary source of income.

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